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INFOPLAN - Latin America and the Caribbean -
A Cooperative System for Economic and Social Information
Report of an Evaluation Mission

February/March 1985

Carl Keren

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Letter of Transmittal

To: Mrs. Martha B. Stone, Director, Information Services Div., IDRC

I accordance with the consultancy contract with the IDRC (3-A-84-4279) of January 15, 1985, I visited Bogota (Colombia) from February 19-23, Santiago (Chile) from February 23-March 5, Asuncion (Paraguay) from March 5-8, Port-of-Spain (Trinidad) from March 9-14, Panama March 14, San Jose (Costa Rica) from March 14-17, 1985. From March 17 till March 20, I visited Ottawa for debriefing.

In the consultancy contract I was required to visit INFOPLAN national focal points in various countries, to assess INFOPLAN activities carried out with IDRC grants by CEPAL, CLADES and ILPES, to review progress of the long-term objective of "DEVSIS-Latin America", to comment on the institutional capabilities of various organisations involved in the system, to comment on the effectiveness of INFOPLAN at the regional, subregional (CARISPLAN) and national level, and generally to evaluate activities related to all aspects of INFOPLAN.

The extensive briefing I was given for this mission by yourself and by Mr. S. Akhtar and the background information supplied to me by IDRC, assisted me considerably in my task. I was able to concentrate on problems which were of immediate interest to IDRC. My hosts in the various places I visited gave me every possible assistance. Mr. F. Damtoft of the IDRC office in Bogota, Dr. R. Brown of CEPAL Santiago, Mr. C. Evangelista of CLADES, Mrs. W. Primus of CDCC and many others, too numerous to mention, facilitated my task, in every respect. Work in Santiago and in Paraguay was done in asscociation with Dr. D. Babini. To work with her was a real and much appreciated privilege. I finally would like to thank Mrs. G. Morin-Labatut of IDRC who took such good care of my travel plans and administrative arrangements.

In my report I have emphasized aspects which I consider to be important for IDRC's decisions on the future of INFOPLAN. In consequence, I wrote relatively little about achievements, and most of the report analyses critically areas needing improvement. I trust that my colleagues, whose work I had to evaluate, have understanding for the resulting imbalance.

I believe that with the establishment of INFOPLAN and its associated activities, IDRC has done important spadework in introducing socio-economic information services into Latin America and the Caribbean. In my report to you, I have given some thought on what could and should be done in order to reinforce existing foundations and to continue building on them.

Carl Keren April 1985

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Foreword

This report responds primarily to specific questions posed in the contract document of IDRC (See Letter of Transmittal) and elaborated upon in several briefing sessions. Although some general background information has been noted, principal emphasis is on the evaluation of specific activities and on the organisations who manage them. The evaluation studies principally how an activity was done, and not why it was started in the first place. Recommendations for improving present activities or alternatives have been appended to each section, or have been noted in special sections. This is therefore a text for decision makers who are familiar with the system under discussion, the presentation does not satisfy the needs of a reader who meets INFOPLAN for the first time.

In view of the rather copious material in hand and the short time available for report submission, I have arranged this report as follows:

An Executive Summary which provides a general overview and introduction to the report.

Chapter I in which the activities of the principal organisations involved in the system are evaluated.

Chapter II discusses some of the main tools employed.

Chapter III investigates the publication program.

Chapter IV proposes some additions or alternatives to existing programs.

Chapter V reports on visits to several countries in the region.

Annex A contains a chronology of principal events in the life of INFOPLAN and CARISPLAN.

Annex B contains statistical and other tables and charts which indicate quantitative, qualitative and financial data relevant to the evaluation.

Annex C contains lists of acronyms, abbreviations and country codes used in the report.

Annex D reports on the persons who were interviewed and the bibliography (in the form of a finding list) of the principal background documents.

Annex E contains some background documents whose retention, with the report, may be useful.

Executive Summary

DEVSIS - Latin America as a cooperative system for the establishment of socio-economic information services has been a long-term objective of IDRC. A preliminary phase was first supported in 1975, to be followed in 1980 by grants supporting the creation of INFOPLAN (a regional information system on planning) and in 1981 of CARISPLAN (a subregional information system in the Caribbean). By now, more than 2.4 million CAD have been spent or are committed by IDRC to these activities.

Recipient institutions and systems managers are the U.N. Economic Commission for Latin America and the Caribbean ECLAC/CEPAL, its department of documentation CLADES and CEPAL's subregional office, in the Caribbean. The Latin American Institute for socio-economic planning - ILPES takes an active part in systems development.

The following figures sum up some of INFOPLAN's activities todate:

(1) Out of 4000 socio-economic information facilities identified in the region, nearly 800 were surveyed in detail (1979).

(2) About 4000 documentary units, many of them elusive "grey" literature, were brought under control with abstracts published in PLANINDEX.

(3) A larger quantity was controlled in the Caribbean subregion and made available to users by CARISPLAN.

(4) INFOPLAN related training was given to more than 550 information officers in more than 20 countries. The training effort in the Caribbean area involved a similar number and covered all countries of the subregion.

(5) Nine countries in Latin America (Argentine, Brazil, Colombia, Costa Rica, Guatemala, Honduras, Paname, Paraguay, Venezuela) and most Caribbean countries have established national networks, national focal points, or both, to handle INFOPLAN activities. Some additional countries participate inofficially in the system.

Quantitative findings represent achievements only partially. The following observations seem to be of interest:

(1) The groundwork for standardization, harmonization and across-border cooperation seems to have been thorough and well entrenched. In this respect, long-term objectives of DEVSIS - Latin America have been achieved.

(2) CEPAL/CLADES has definitely succeeded in creating the atmosphere, infrastructure and organisation needed to cope with socio-economic information services. This was done at several national and subregional levels which are, partly, relatively well-established by now. CLADES has failed to exploit its success and to build on it a program for future activities. IDRC's support has been instrumental in enabling CLADES to implement its program.

(3) INFOPLAN is a catchword which has been interpreted somewhat differently by each participating unit. Some countries have adopted it officially, in some the adoption is professional, in others the concept is just starting out. It has been most succesful in the Caribbean. Effectiveness and usefulness are difficult to evaluate, but the general impression is rather positive on both points.

(4) Other "invisible" benefits include the introduction of concepts relating to standardization and systems harmonization, benefits of national and international

networking, mission- and subject-oriented information collection, senior management support for socio-economic information activities, some understanding of modern information technology. The least visible, but perhaps the most important benefit has been that in many countries and organizations, the information services are for the first time invested with some prestige and are coming to be recognized as a force in their own right. The connection with an international organization such as CEPAL/CLADES has been a principal factor in this achievement, a factor likely to remain of importance for some time to come.

(5) INFOPLAN and the mechanism which has been established to make it work, are a promising system, not yet optimized, but auguring well for future development. CLADES as an organization has established INFOPLAN and has been instrumental in creating the infrastructure to carry it further. IDRC's support was instrumental in making this activity possible.

(6) CEPAL has by now absorbed in full CLADES personnel and PLANINDEX production. It is, however, doubtful whether CEPAL on its own can generate the initiatives and the seed money which are needed to achieve the long-term objectives of INFOPLAN (as a pilot project and, better still, as a carrier of DEVSIS type services). CEPAL and also ILPES, have demonstrated an ability to work in close harmony with CLADES and to derive and impart mutual support. CEPAL needs, however, professional stimulus from outside in order to institute professional and managerial adjustments into the CLADES structure. The recognition that such adjustments are necessary was reinforced during this mission.

(7) CARISPLAN fully acknowledges its debt to CLADES as founding father and systems planner and trainer. CARISPLAN as a very

active and independent-oriented activity has difficulties with CLADES technical operations, its response time and its subject restrictive policies. The autonomy which IDRC's most recent grant promises, will enable CARISPLAN to participate in INFOPLAN on a junior partnership basis. There is no intention to cut the umbilical cord, neither to CEPAL nor to CLADES.

The evaluation process has identified many weaknesses:

(1) INFOPLAN requires new interpretations and an improved organisational and managerial approach through which they can be translated into operating systems.

(2) CEPAL, ILPES, and others have failed to pose professioanl challenges to CLADES and to participate in its management. CLADES has not developed as it could have. Technical processes are cumbersome, time-consuming, and their cost-effectiveness is very low. There is no concentration of effort; no serious attempt was made to measure users reactions and in making systems participants actual partners in the systems development process. Forward planning is not up to acceptable standards, product evaluation is non-existent, modern information technology use has been found wanting.

(3) Weaknesses are observed in conceptual, organisational, managerial and operational matters. Some recommendations are included which will hopefully assist in giving INFOPLAN and its managing organisations new momentum. Most recommendations concern:

- The adjustment of infrastructural elements to identified needs.

- Measures designed to improve systems/users relationships.
- The shifting of external grants from a general support of activites to highly specified objectives producing quantifiable results.
- The provision of support at its point-of-use.
- Improved forward planning and concentration of effort on priority activities.
- Increased attention to system monitoring mechanism and systems flexibility and use.
- A clearer division of work between the regional, subregional and national organizations involved.
- The application of the CARISPLAN experience to similar circumstances.

In the final analysis, it seems that IDRC grants have successfully stimulated the emergence of socio-economic information services for development in the region. This is not going to say that there has always been adequate attention to cost-benefits and cost-effectiveness and that more could not have been done if a similar evaluation would have taken place a year or two earlier. It is certainly not my opinion that the organization and operational achievements are so well entrenched that they will be maintained and continued, whatever the rate of external assistance. But the general trend seems to be favourable, and the implementation of some of the recommendations in this report are likely to reinforce it.

Chapter I

Organisations involved in INFOPLAN

CLADES (Centro Latino Americano de Documentation Economica y Social)

CLADES is a unit within ECLAC/CEPAL (Comision Economica para America Latina) the Regional Economic commission of the United Nations Organization. CEPAL operates through two directorates, one of which directs all subject-oriented activities, the other one the service-oriented divisions (administration, computing, library services etc.). CLADES reports to the services directorate.

ECLAC/CEPAL (CEPAL for short) is the contracting partner for IDRC whose grants are evaluated in this report. CLADES has operational responsibility within CEPAL for these grants.

At the time of writing, (March 1985), CLADES has eight (8) staff positions and a small number of non-permanent staff members. Organisationally, CLADES operates in 3 groups:

a) INFOPLAN (headed by Mrs. M. Beya)
b) Information Processing (headed by Mrs. L. Johnson)
c) Cooperation (headed by Mr. J. Cubillo)

The INFOPLAN group coordinates IDRC supported socio-economic information projects; the processing group is responsible for data base construction and maintenance, input-output processing and macrothesaurus problems; the cooperation group maintains international contacts and handles computerized systems development. Obviously, lines of responsibility are ill defined, there is much overlap and the underlying reason for the organisational approach seems to be personal rather than functional.

A short historical review

A great many reports and other publications have been written by, on, or about CLADES since it was first established in 1971. Closer

investigation, however, reveals that only very few hard and verifiable data are available on CLADES activities and its prowess and accomplishments. Such data as exist are difficult to identify in the many pages of documents which were published on CLADES and its activities.

It appears that soon after its establishment, CLADES found that it lacks basic data to start any meaningful activity and that its first task should be the identification of ongoing information services (in the socio-economic field) in the region. An early estimate mentioned more than 4000 separate organisations (libraries, information centers, data collections, etc.), and a decision was taken to survey these activities in a more formal manner. Under the project title of DEVSIS, Latin America, IDRC agreed to finance this survey.

A questionnaire was composed and sent to the various institutions and organisations identified as potentional contributors to, and beneficiaries of socio-economic information services. Several meetings were held at CLADES and in various countries in the region to assist in the data collection process. Approximately 750 libraries, information centers and other institutions from 22 countries responded. Completed questionnaires were analysed and a directory of the responding institutions was published in 1978, to be followed , in 1979, by an analytical, statistical and sociological discussion and evaluation.

These studies, and even more important, the personal contacts established before and during the period they were made, led CLADES to formulate INFOPLAN and to prepare its operational philosophy and policy. It was assumed (by hindsight, only partly correct) that various potential users of socio-economic information, and especially national planning organisations, would give wholehearted support to a regional information service, and that information services at the national level were mature enough to carry the principal workload which such services entail. The background for this decision process

was impossible to trace. It seems that planning organisations were selected as the initial target audience because these organisations occupied at that time a rather prominent position in the political fabric of the region.

INFOPLAN, as conceived by CLADES, was to collect information on, and possibly also about planning, and to make such information available in the DEVSIS format to potential users. In a large-scale training effort (involving more than 550 people), methods for information collection, selection and analysis were taught in a large number of countries, and various manuals and operating procedures for document handling were written and widely disseminated. Many of these manuals and procedures have become virtual standards in countries of the region, even for services which are outside the scope of INFOPLAN. By means of an abstract journal, PLANINDEX, the collected information is now made available to potential users.

A second phase of INFOPLAN, also financed by IDRC, was initiated in 1981. This second phase was principally designed to ensure INFOPLAN's viabilty by consolidating the activities of the national and subregional networks which constitute the systems backbone. During this phase, operating procedures and processes were to be finalised, publications to be firmly established and accepted by users, more sophisticated information services (of the DEVSIS II level) were to be developed.

In this short historical review, note should be taken of the close cooperation of CLADES with CEPAL and with ILPES. CLADES and CEPAL found that their cooperation benefits both and their activities in the region were and are enhanced by it. INFOPLAN personnel which were originally financed by IDRC'S grant, have been absorbed into the CEPAL establishment. ILPES too has found in CLADES a partner whose activities are mutually complementary with its own.

CLADES now (MARCH/1985)

CLADES still operates principally within the range of objectives set in 1981 for INFOPLAN Phase II. These objectives were only partially attained, some of them are still in the future. Specifically:

a) A subregional INFOPLAN node is operational only in the Caribbean. Some talks were held about the establishment of an additional node in Central America, but nothing has materialised as yet. The number of national networks which participate in the system has not increased significantly and few of the networks which are operational seem to be firmly and permanently established.

b) The technical processes and related activities have become well established, but having been "frozen" at their initial conceptual level they are in urgent need of revision and adjustment to reality.

c) Cooperation with other regional information systems has been advanced. The degree to which compatability and elimination of duplication has been achieved, could not be ascertained. Spot-checks indicate that merely a beginning has been made.

d) PLANINDEX has been produced, but the selectivity of the subject scope and inefficient production methods detract significantly from its usefulness.

e) Experimentation with more advanced information systems (of the DEVSIS II level) is still in a very elementary stage. In fact, CLADES has not yet mastered the state-of-the-art, much less made progress in its application.

f) Provision of information services to users is still very much library-oriented. In the absence of reliable data it is possible to convey only the general impression that end-user services are still in their infancy.

CLADES has some important achievements to its credit:

a) Through the propagation of the INFOPLAN concept, socio-economic information needs and services have become known throughout the region. They are accepted by users and by service providers as a legitimate and necessary area of activity.

b) Many information system managers have become aware of the need for standardisation and compatability and quite a few have accepted CLADES technologies as trend setters.

c) The CLADES concept that regional activities must be built on networking hierarchies: subnational, national, subregional and regional, has become well established and accepted. This is a considerable achievement, especially because modalities were also worked out in order to implement the basic concept.

d) CLADES has successfully gained the support of its mandating authorities, CEPAL and ILPES. INFOPLAN activities which were initially funded externally, have now been absorbed by these organisations. A firm commitment was obtained to deepen the involvement and to enlarge its scope.

e) CLADES has demonstrated that a national-level organisation which has the backing of a repected and acknowledged international organisation, has much to gain. Such backing, if it is unstintingly given and with no strains attached, provides leverage and legitimacy which many national bodies

cannot obtain on their own. CLADES understood the role of its support and has played its part judiciously.

CLADES has failed in several tasks, whether specified explicitly in its INFOPLAN mandate or implicit to its role as a leader of socio-economic information systems developer and coordinator.
Specifically, I would mention:

a) Lack of controls, insufficient monitoring of activities, absence of quantitative and qualitative data and measuring instruments, have prevented due appreciation of trends, gain of knowledge from experience, operational changes where required, the exploitation of strengths and the rectification of weaknesses. Concepts, procedures and processes once adopted, were "frozen" and considered immutable and the resulting inflexibility interfered with the translation of pilot projects into efficient products.

b) CLADES has failed to understand that in any networking scheme, the lead organisation is only "first among equals". No mechanism was created which would ensure consultation with and feedback from participating networks, nor was there sufficient attention to activities designed to ease their work. Users' needs were not studied, nor were their comments on services sought. The provisions of PLANINDEX was and still is considered to be the highlight of INFOPLAN, for users to accept as the ultimate achievement of socio-economic information services.

c) The organisations from which CLADES draws its mandate and sustenance, specifically CEPAL and ILPES, did little in order to stimulate a more inventive and professionally satisfying climate. CLADES operated largely in a managerial vacuum, most of its workplan was left to its own devices.

Only in 1985 did CEPAL's director draw up a plan in which many of CLADES problem areas are going to be dealt with.

d) The internal organisation of CLADES seems to be unsuitable for the work the unit is supposed to do. There are no clear- cut professional responsibilities. All activities require that operations are shifted between groups, basic registration and monitoring tools are not applied. CLADES management structure needs strengthening - administratively as well as professionally.

e) CLADES lacks adequate planning of its activities. Priorities are ill defined, alternatives have not been considered, short-term planning is partial and undefined in nature, and the parameters which decide its feasibility have not been described. Medium and long-term planning is vague and very preliminary in concept as well as in actual work-plans.

f) CEPAL maintains several service departments on which CLADES is functionally dependent, each doing "their own thing". The Cataloguing Unit has set arbitrary quantitative standards for CLADES material to be processed, computerised activities are frequently not sufficiently responsive to needs, the CEPAL library refuses to deal with some CLADES documents (the "grey" literature). The various data bases maintained by CEPAL are perhaps compatible. Whether they are complementary and harmonized seems doubtful. A separate division deals with the publication printing processes, again having priorities of its own which are not necessarily compatible with CLADES priorities. As all these activities are coordinated by CEPAL's service directorate, a solution to solving these problems seems obvious.

g) During none of the INFOPLAN phases has there been a serious effort to cope with problems of document supply. Both Phase I and Phase II grants included an objective that document supply should be an indispensable part of the newly created services. At present only a limited number of worksheets are supplied to CLADES together with the documents to which they refer. These are the only documents which the end-user has a good prospect to receive if a PLANINDEX entry is found useful. The very small figures quoted for actual document supply denote either a very limited usefulness of PLANINDEX or users resignation to CLADES inability in that respect.

Some of the foregoing comments may sound unjustly critical, perhaps because the difficulties experienced by CLADES in INFOPLAN implementation have not been fully discussed. After all INFOPLAN was (and is) an experimental system with no precedence to guide it. Its designers had to find a balance between information provision and users satisfaction (the "hen and egg" dilemma). They had to face political circumstances and events which might destroy overnight years of professional efforts. CLADES had to work by concensus and by committee. It was not assisted by critical and unbiased inputs, nor was it required to establish cost-efficient management procedures. CLADES works in a large geographical region where personal contacts and professional control are difficult to maintain. Information personnel, who are CLADES partners, often have underprivileged status; few decision makers appreciate their work. Considering all these, and many other factors, much has been achieved. It would be incorrect and unjust if the critical comments in this evaluation would result in a negative reflection on INFOPLAN and on CLADES efforts to make it a viable system. An evaluation of the past is useful for charting further activities. Critical comments should be considered in this light.

Recommendations

Remark: Recommendations which require a significant, and probably external input of resources are described in separate chapters. In this chapter, recommendations which seem feasible within CLADES and CEPAL internal resources are discussed:

1) CLADES should be reorganised so that clear (and personal) lines of control and responsibility for projects are established. For each program and subprogram basic administrative and current quantitative and qualitative control procedures should be drawn up and maintained.

2) Workflow, bottlenecks, lacunae should be checked in CLADES as well as in related departments in CEPAL. It seems that the service division as a whole can contribute significantly to a streamlining of activities.

3) CEPAL, ILPES and CLADES would probably find it useful to create a joint management system for INFOPLAN where problems of policy and of operation can be discussed and decided upon.

4) Users reaction to services and users needs should be reviewed and relevant service adjustments be made. This is not a recommendation for extensive users studies, but improved response to real and expressed needs is likely to emerge.

5) CLADES should institute a permanent planning activity which would detail the short-term workplan and investigate and propose medium and long-term programs. Planning parameters (such as funding, personnel, information technology, etc.),

alternatives and priorities should be identified and assessed.

6) The institution of some of these changes might require that CLADES and/or CEPAL and/or related departments be reinforced by some additional personnel. It is recommended that CEPAL's director considers a marginal increase in manpower whether permanent or temporary, full-or part-time, which may be necessary to make progress effective.

7) An urgent effort needs to be made in order to cope with document supply problems. A document which is announced in any information service, must be available to an end-user without undue difficulty. The best method (not necessarily the most cost-effective one) would be a document supply service from CLADES, preferably in microform (microfiche). The establishment of such a service is expensive and manpower-intensive and also requires that the user has the capability to produce paper-copies from microforms. In view of these problems, administrative and organisational steps need to be taken to ensure document availability by other means, but this aspect of the INFOPLAN program should certainly no longer be neglected.

8) The relationship between task and organisational structure has been repeatedly stressed in this report. Of the many options available the following division of tasks in CLADES (assuming 8 professional staff members), seems worth consideration:

1) Director
2) PLANINDEX production processes, including additional issues for countries and special subjects
3) Information technology focal point

4) INFORMATIVO Newsletters, other publications
5) INFOPLAN development, planning, Macrothesaurus, ILPES liason.
6) National Focal Points coordination. Assistance to national networks.
7) Development of data banks, Reference Services
8) Coordination of training, manuals, teaching aids, etc.

This suggestion represents only one possible solution, with other options equally valid. But CLADES should assign a program officer fro every project and program it is engaged in, so that lines of responsibility and authority are clearly defined. It goes without saying that for any program, and especially programs of an operational nature (such as PLANINDEX), a substitute program officer must be prepared to take over if, for any reason, the regular officer cannot attend to his duties.

ECLAC/CEPAL, ILPES and INFOPLAN

ECLAC-CEPAL, and CLADES as its agent, represent the UN In the region. Any activity and demand initiated by them, carries United Nations authority.

A UN organisation operates under some liability and political restrictions. It has to work with national institutions and has to tread the national political line. Data which are not approved (for political reasons) by national institutions or external documents which are not acceptable, would be automatically excluded. in the reality of political life in the region, performance of socio-economic information systems could be affected by these constraints.

Operations under the UN umbrella are affected by the latter's personnel and cost structure. Personnel must respond to UN professinal

qualifications and its policy of equitable geographic distribution (quota system). Costs are different from actual local costs (higher) and the burocratic overhead is considerable. This is (partly) offset by ease of travel and contacts and availability of services and communications.

ILPES operates out of CEPAL as a semi-independent academic and technical training institution. ILPES participated actively in the design of INFOPLAN but its continuous involvement was affected by an internal economic crisis and reductions in personnel. ILPES makes its considerable personal contacts in the region available to INFOPLAN's staff, and information about INFOPLAN is disseminated in ILPES courses. At the same time, it is necessary to appraise realistically the limited influence of ILPES on national planning organisations and its lack of resources.

Both CEPAL and ILPES have a principal objective of improving socio-economic activity and development in Latin America. CLADES, through its INFOPLAN program, provides an essential link to the information services necessary to achieve such a broad objective. This is especially true if INFOPLAN is interpreted as a pilot project (or even as an umbrella term for DEVSIS type of services), because then it can be applied to any form of socio-economic national information system. An INFOPLAN program which would deal not only with planning but could also be integrated with special subject fields and the administration of development in general, would address a very large users community, and because of that be much better known and appreciated. Such a program could possibly circumvent the political weakness of some national planning organisations and their lack of an indigenous information infrastructure. INFOPLAN in its broader connotation (as indicated above), would be acceptable to many countries in the region, in fact it is highly probable that to develop INFOPLAN further would be very much easier than the introduction of new systems with different names, methods and managing authorities. CLADES

has succeeded in setting up itself and INFOPLAN as household words. That is a success which should be exploited.

CEPAL's director of the service division seems to agree to a large degree with this assessment. Quite independent of the present evaluation, he has proposed a 1985 workplan which would considerably advance the broader objective. This plan is summarized as follows:

- To promote the use of CEPAL's data bases and to instruct CEPAL personnel in proper search procedures. To institute users studies regarding the utility of these data bases (PLANINDEX, DOCPAL, CEPALINDEX and CARISPLAN).
- To study methods of document accession services through microfiches.
- To revise and update the manuals for the common bibliographic system.
- To finalize the transfer of data bases to the CDS/ISIS format in order to facilitate on-line services. The subject coverage and scope of each data base is to be reviewed.
- To design methods by which the bibliographic units of ECLAC in Mexico and in San Jose can be integrated into the common system.
- To determine, together with the Computer Center, possibilities of conversion and compability of other regional data bases.

Furthermore, the director considered favourably my suggestion that his office should be increasingly involved in INFOPLAN, and especially in operations which require the coordination of several CEPAL service functions, implying also some addition and/or shifting of resources and of personnel.

ILPES directors are also convinced that more effort is required and possible, on their part, to advance CLADES' activities. A commitment

on ILPES's part, which summarizes discussions held, is enclosed in the Annex to this report.

Recommendations

1) To redefine INFOPLAN as a regional socio-economic information system within which various subject and mission-oriented systems can eventually be integrated.

2) To ensure CEPAL and ILPES involvement in INFOPLAN's objectives and management in order to develop the system beyond the bibliographic level.

3) CEPAL's Caribbean office has successfully initiated a subregional operation for its own INFOPLAN related needs. Other CEPAL and ILPES offices could usefully emulate that experience.

4) CEPAL to take immediate steps to make present INFOPLAN operations more cost-effective and efficient, thereby freeing personnel and resources for activities which only an organisation of its mandate and authority can probably deal with. CEPAL should also ensure that related activities of other UN agencies are compatible with its own programs and efforts. There are some indications already of lack of coordination, and not much imagination is needed in order to estimate the waste of resources and loss of prestige which is likely to result.

5) ILPES is recommended to include the use of socio-economic information in its courses. Course material should introduce students to the need for information, to services available, to problems of document control and availability, to the use of internal and external information resources, and to the role of INFOPLAN in the ECLAC region. Thesis work by students

should require that traditional as well as non-traditional information sources be adequately used.

Subregional INFOPLAN Networks

The establishment of subregional centers, which would ease the communications between CEPAL-Santiago and national networks, has been a CLADES objective right from the inception of INFOPLAN. Until now only the subregional center for the Caribbean, situated in Trinidad, has actually became operational, principally because IDRC financed its development and running-in.

A justification for subregional networks can generally be found in increased management effectiveness because of: similarity of problems (and solutions), ease of communications (geographical proximity), precedents in other areas of subregional cooperation, and, in consequence, less cost. The CARISPLAN network fully justifies these assumptions.

The Caribbean center operates within the ECLAC/CEPAL office for the Caribbean. The Caribbean Development and Cooperation Committee (CDCC) and the countries it represents in the subregion have established a Caribbean Information System (CARISPLAN) managed by the Caribbean Documentation Center (CDC) in CEPAL's Trinidad office. CARISPLAN is the Caribbean equivalent of INFOPLAN, in name as well as in contents.

Several factors contributed to CARISPLAN semi-autonomous and relatively fast development:

a) Most countries of the Subregion use English as their lingua franca and not Spanish or Portuguese as in other parts of Latin America.

b) Most countries are very small and their cultural and economic background is very different from that of countries in Latin America.

c) Communications within the Caribbean subregion are more developed and more personal than would be feasible in other countries in Latin America. Contacts with North America and Europe are also more pronounced in the Caribbean Basin.

d) A relatively liberal interpretation of the subject scope enables CARISPLAN to receive input from a large number of facilities and to interest many users in its products.

The financial means supplied by IDRC enabled CDC to maintain contact with focal points and networks which participate in CARISPLAN and to convey to them the feeling that they have at least as much to receive as they are asked to give. The technology and initial training for CARISPLAN (in lieu of INFOPLAN) were given by CLADES. CARISPLAN Abstracts production is done by the Computing Center of CEPAL in Santiago from input provided by the CDC on diskettes. Differences in subject scope and in indexing methods have caused, over the years, some erosion it the compatibility between the CLAPLAN data base (from which PLANINDEX is produced) and CARBIB which is the computerized data base of CARISPLAN inputs.

Once CARISPLAN receives its HP 3000 machine under its 1985 grant agreement with IDRC, the Caribbean Subregion will become largely independent of CEPAL/CLADES. CARISPLAN Abstracts will in future be produced in Trinidad and other data bases and services which are derived from them, will successively be established.

CARISPLAN management has avoided some of the difficulties which CLADES has experienced in Latin America. The relative homogenity of the Caribbean region and its political stability were probably one of the principal reasons why, over four years, the number of participating

networks increased from 4 to 14 and the number of participating information facilities is now over 160. A close systems-users relationship has led to the early recognition that the original subject scope was too restrictive. Input selectivity was loosened up considerably, with the result that CARISPLAN today responds to broad user needs. The relatively pragmatic approach adopted by CARISPLAN management has produced imaginative and rather bold systems development schemes. In cooperation with the World Intellectual Property Organisation an attempt will be made to offer a data base on patents and in cooperation with CARICOM (the Caribbean Community Secretariat) a variety of information services in Trade and Commerce, Agriculture, Energy and other fields will be developed. There was no opportunity to gain an impression on whether available resources and personnel will be sufficient to support these ambitious objectives.

The publication program of CDC is worth mentioning. Most publications, are user-oriented, their language is non-technical, contents short and to the point, publication schedule is timely. Publications seem to be well known to users and appreciated by them.

The recent Project Summary of IDRC (No 3-P-84-0207 of December 84) described CARISPLAN in detail and makes an extensive write-up in this report superfluous. Several question marks exist, especially concerning the following points:

a) Are there sufficient resources and especially personnel available in order to cope successfully with new technologies and new systems over a length of time?

b) Will there be sufficient professional detachment and long-term planning in order to maintain Latin-America cooperative arrangements and compatibility with INFOPLAN?

c) It is possible to generate within the next few years sufficient users support and indegenuous resources to

guarantee systems maintenance without continuous external funding?

Judging by present standards and management support, prospects for sucess seem reasonably good.

Recommendations

1) To establish, as soon as possible, a forum of coordination between CEPAL/CLADES and CEPAL/CDC which would ensure that activities are fully compatible and coordinated and that experience, systems procedures etc. are transferred between organisations, now, as well as in future.

2) For IDRC and CDC to review the most recent project after about one year in order to decide if changes in objectives and/or schedules of expenditure are necessary. By that time some operational experience will have accumulated, so that early plans can be adjusted to actual reality.

3) To use the CARISPLAN experience in order to build similar subregional INFOPLAN activities elsewhere. Two subregions seem especially promising - Mexico and Brazil. CLADES has prepared a proposal to support a national informaiton network and Focal Point in Mexico. It is now recommended to amend this proposal and to create in Mexico a structure which could be called CENTRIPLAN i.e. assigning to it a subregional responsibility and authority which would aim at a semi-autonomous status similar to the one now enjoyed by CARISPLAN. The support required for CENTRIPLAN will, probably, be rather similar to the support required for a purely national activity, but INFOPLAN objectives are more likely to be advanced in a CENTRIPLAN type organisation. If this recommendation is accepted and supported by IDRC, it is suggested that CLADES and CDC participate in the

subregional planning process. It is further suggested that CENTRIPLAN should be placed in CEPAL's office in Mexico, although not necessarily into the library of that office. INFOPLAN activities and support for them should develop user-oriented informations services and their status in CEPAL's library should be accordingly. INFOPLAN is not identical with a library service.

4) For Brazil, because of the size of the country and the fact that it speaks Portuguese, a structure similar to a subregional INFOPLAN office might be considered with advantage. Not having sufficient background information I tender this recommendation in this very preliminary form only.

National Networks and National Focal Points

INFOPLAN in Latin America and the Caribbean is based on a cooperative venture by the countries of the region. Information facilities (libraries, information centers, research institutions, government offices, central banks, etc.) which are engaged in socio-economic affairs, are supposed to supply worksheets and documents to a coordinating facility (National Focal Point) operating at the national level. The national coordinating office augments the data it receives and forwards them to a subregional office (presently implemented only in the Caribbean region) or directly to CLADES in Santiago-de-Chile. Information users address themselves directly to CLADES.

During this evaluation, the activities of some national networks/national focal points were studied on the spot (Colombia, Paraguay, Trinidad, Panama, Costa Rica, Argentine). Other information was collected by different methods. It appears that Focal Points in

Argentine, Brazil, Costa Rica, Guatemala, Panama and Paraguay are relatively well established, those in Colombia, Honduras and Venezuela still need additional inputs in order to ensure viability.

CLADES has tried to establish focal points and networks in other countries of the region, but for a variety of reasons, principally political, these efforts have not yet produced results.

Nations in the Caribbean subregion are nearly all integrated into the INFOPLAN scheme under the leadership of the Caribbean Documentation Center (CDC) of the ECLAC office in Trinidad.

In nearly all countries, the national focal points have been placed in an information facility serving the national planning office. This is in line with the subject scope which INFOPLAN presently pursues. National networks, where they exist, embrace information facilities covering the whole range (or nearly so) of socio-economic interest areas. In consequence, national activities are much affected by the role that planning offices play in government affairs. A senior Ministry is likely to enhance activities, if the planning office is of junior standing the authority of the units it controls is less pronounced. Also changes in government or its senior officials are likely to be followed by personal changes at lower levels, thereby negating training efforts and previous organizational arrangements.

An exhaustive analysis of problems and capabilities of national focal points/networks in a DEVSIS related environment is not in the scope of the report. Believing, however, that the basic organizational and hierarchical approach adopted by INFOPLAN designers is the only feasible one, some recommendations which could reinforce the national level activity and give it additional scope, seem indicated.

Recommendations

1) Present training efforts by CLADES are directed at the immediate operational level of countries. The results, as far as personal expertise of trainees in concerned, have been good, cost effectiveness is not that positive. A system by which CLADES trains national trainers should be developed. It is suggested that CLADES organise a training course to which a suitable person from each country which participates in INFOPLAN (including the Caribbean) is invited. This course should be well prepared, with adequate support material and teaching aids, and its graduates should be able to assume training responsibilities and organisational assistance in their home country. In order to eliminate, as much as possible, political interference, it is suggested that trainees are selected from academe or from institutions which are not immediately affected by political changes. CEPAL offices in various countries may aid in the selection or ever identify a staff member to serve in a trainer capacity. Trainees will have to be given some financeial incentive in order to devote time and effort to their task. It is assumed that whatever the direct cost, it will still be lower than the present costs. If this proposal works out well, it may be advisable to repeat the basic course in order to train a stand-in which can assist the principal trainer and/or take his place in case of need.

2) National networks should be given some leeway to work out their own subject scope in addition to present INFOPLAN requirements. Working methods and procedures, thesaurus use, etc. should still be controlled and centrally coordinated, but countries should be able to deal with any socio-economic informations area in which they identify users needs and in which they have the capability to give service. A central task for all national networks should be the collection and control of their national, "grey" literature (Reports, working papers, etc.), even if national policies prevent their international

dissemination totally or partially. CLADES should propose to national networks a system which handles restricted documents side by side with documents which can be freely announced.

3) Nearly all national focal points/networks participate in INFOPLAN through the application of manual working methods. Assuming an national input of 200 items per annum with the present subject scope - an investment of about two men/months is required at the national level, and much more than that at CLADES, until a document is on stream in CLAPLAN. Until a document is returned in searchable format to the participating country, more manpower and time is needed. A broader subject scope and/or better response to users needs is difficult with present working methods. It is suggested that the installation of microcomputers at the national network level would increase efficiency and possibly make participation in INFOPLAN much more desirable and durable. The suggestion is for a relatively simple, low-cost machine (preferably IBM compatible), equipped with double-density diskettes and a matrix-type printer.The software should be able to handle INFOPLAN inputting sheets (and perhaps also a normal library index card), table-look-up for standard data, copying material from one diskette to another, extraction of standard data from input, the manipulation of standard data elements and sorting them into sequence, printing of results.

Preferably national networks should be equipped with standard hardware and software. If the latter cannot be purchased ready made, its commercial preparation is recommended. Total cost per installation could probably be less than 3500 Dollars. One of the products of a national mechanisation policy would be that national INFOPLAN entries are mailed to CLADES on diskettes in standard format. The immediate preparation of document finding lists and authority list for local use are also possible. An invisible benefit would be the introduction

of modern information technology at the national level providing potentially a considerable boost to DEVSIS related objectives.

Chapter II

Tools used in INFOPLAN

Subject Scope and Target Audience

Socio-economic information for development (or for any other application) poses many challenging problems to the information services planner. He is faced with an enormous quantity of documents in which such information is recorded, sources of information extending nearly across all strata of human activity, knowledge inscribed in practically all forms and formats, from trivial prose to the most highly specialised data collections. Natural languages, mostly in amorphous forms, allow multiple interpretations and meanings; a relatively long-life expectancy of information exacerbates systems management control by increasing the quantities required for access, etc. The problems associated with information services construction, control and dissemination in areas related to natural sciences and technology, considerable as they may be, are dwarfed when compared with problems occuring in handling socio-economic information.

A consideration of users-needs compounds system complexity. Most scientists and technologists are exposed to information services throughout their whole professional life and taught that disregard of these services is fraught with professional peril. No such constraints apply to many users of socio-economic data, those in public service and frequently also those in academe often manage to do without adequate information or even to disregard it entirely.

DEVSIS designers were well aware of the promises and problems inherent in the information services whose better use they tried to develop. There was (and still is) an obvious need for selectivity and well defined subject scopes and target audiences if socio-economic informations systems are to have prospects of success. Even then, relatively large investments are to be expected, cost-benefits and cost effectiveness have to be newly interpreted and different time scales for attaining systems maturity are required.

INFOPLAN designers decided to identify national socio-economic planners as their target audience and to limit the systems subject scope to information on or about public service planning. Regretfully, an adequate description of the selection process or its alternatives is not available. Such a description would have been useful as a background to this evaluation.

At least by hindsight, a reassessment of subject scope and target audience seems in order. Planners and the institutions in which they work are proverbial for their political instability, at least in Latin America. Whenever changes of government occur or even if only a high-level personal change is effected, planning staff are nearly always the first to go. The role of the planning institution itself is as fragile as the permanence of its staff members. In certain political or socio-economic circumstances, planning takes a place second to none; another date or administration and theirs is an exercise in futility.

It seems logical to assume, although difficult to prove, that planners have in these conditions few incentives to improve on their long-term decision processes, and their propensity to use information services in their task should be evaluated accordingly. At least in the public service sector there is a clear preference for immediate or short-term information of an unsophisticated type and for services which provide ready-to-use information, not needing much background study or interpretation.

Additionally, it should be considered that planners generally require access to a broad range of subject areas and very diverse sources of information. Their interest in what other planners do, or in the results of their studies, is rather limited. At a time of rapid socio-economic change and of fundamental variations in national policies and priorities, a slow-response information service on, or about planning is bound to be handicapped from the outset. Some of the difficulties which INFOPLAN experiences in its attempt to establish a

permanent, well functioning service may probably be traced to the political instability of its target audience and to some of the factors mentioned above (see also the report of D. Babini, dated March 7, 1985 which was compiled for this study).

CARISPLAN, in contrast to INFOPLAN, permits a very much broader subject scope. A 1983 sampling of records identified only some 13 percent of documents directly related to planning. Limited selectivity resulted in high input figures and large print volumes for CARISPLAN Abstracts. Although total use statistics are impressive, it may well be that the data base is rather "noisy" for some of the users for whom it is primarily intended.

How best to define target audience in need of socio-economic information and the subject scope responsive to these needs, merits additional study. Poor systems response is as detrimental to system performance as is overload. Sophisticated machine based systems which permit a "fine-tuning" of search procedures are unlikely to become available in the near future and alternative methods should therefore be sought. The least procedure to be followed should be a thorough analysis of the required subject scope at the time of systems establishment and the institution of a permanent reviewing and adjusting authority. This minimal requirement is missing in INFOPLAN, and CLADES was not aware of the necessity for its establishment.

Recommendations

1) To retain, at least initially, planners as the principal target audience. Their needs are likely to present a broad and challenging basis for any socio-economic information system.

2) To change the subject scope from information on or about planning to information for planning. This change requires an in-depth adjustment of present document selection processes (and the manuals written for that purpose). This adjustment should

involve users representatives and professionals active in ILPES and similar organisations, including also those active in the economic and commercial sector. A high priority should be accorded to this recommendation.

3) The adjustment of INFOPLAN's subject scope is likely to require that an economist joins CLADES staff as a permanent member. A very much larger throughput of documents is likely, and operational procedures at the national as well as at the CLADES level must be able to cope with the larger quantities (and different qualities) of documents. Here the adjustments are likely to be organisational rather than requiring more personnel.

4) A subject scope monitoring and review mechanism should be established on a permanent basis. CLADES should appoint an advisory committee composed of end-users (not representatives of libraries etc.) and consult its members on a regular basis.

The Document Input Sheets

The document input sheet which is used by both CLAPLAN and CARISPLAN has undergone several changes during its lifetime. The last revision was in 1982 and since then it has become the inputting standard. Two formats are used, one a quarto sized paper (HDB) and one a card sized form (TRB) which is used by inputting centers which maintain for their internal purposes a manual card file. The worksheet is based on the UNISIST format for machine readable records. An additional form (HAC) is used for CLADES analytical processing.

Within the framework of this evaluation, a detailed examination of the worksheet and the use made of it was impossible. It is mentioned in this report for the following reasons:

(1) A significant amount of training is required in order to comply with basic formats.

(2) A highly trained person needs at least one hour in order to complete each sheet. Most professionals need more time.

(3) A large amount of data, much of it non-mnemonic codes, make the completed sheet highly error-prone.

(4) An extremely complex set of operations, involving many iterations, are required before a worksheet becomes eventually a machine readable record.

(5) The number of data items recorded on the sheet produce machine records which are on the average very much larger (twice and more) than the size allowed in most international abstracting services. The large size implies more inputting effort, more machine time, larger storage requirements, slower response time, etc.

A revision of worksheets is required because personnel resources available for INFOPLAN activities are finite and the large and complex record diminishes decisively the time and attention-span which other INFOPLAN and CARISPLAN activities need so urgently. The effect which the worksheet achieves is partly formal, and some of its benefits hardly justify the additional resources needed.

After about four years of operation, the worksheet (and the manual written for its operation) should be reexamined. In view of the far reaching implications of present procedures on system capabilities,

this examination should receive high priority. Attention should be given to various trade-offs (such as deep indexing vs. title amplification), timeliness (shorter, simpler records = faster throughput), error correction procedures (fewer iterations), machine time and space requirements, etc. For many input items, a finding-list approach seems adequate, and a full-blown bibliographical description seems a waste of resources. The present layout of the worksheet was done with CLADES convenience in mind, now it is necessary to take stock, check previous planning, consult with users and update procedures. In a networking environment, all partners are equal and should be treated as such.

These remarks are not to be construed as a critique of the worksheets as such. The worksheets format puts significant constrants on systems development, and possibilities of optimisation, should be investigated.

Whatever decisions are taken, it is strongly suggested to retain, at least initially, basic formats, code descriptions etc. even if they are not to be used or are to be simplified. Thus, no retraining effort will be required.

Recommendations

(1) To reduce the types of worksheets in use, to simplify their layout and to reduce the number of required entries into each worksheet. Preferably a single type of worksheet (or rather card) should be designed which would serve manual as well as computerized systems.

(2) To reduce the number of entries which need to be verified. To create tables and table-look-up procedures in order to reduce manual processes and improve error correction.

(3) To limit record size to about 1000-1200 characters in order to speed up processing and improve computer operations.

(4) To work out procedures by which worksheets are transmitted to CLADES in machine readable forms, at least from the principal inputting centers.

Macrothesaurus

One of the pricipal aims of the original macrothesaurus was to ensure that classification made in any of the languages used in it would be retrievable by using other languages. In the CEPAL region of responsibility, five languages are used (Spanish, Portuguese, English, French and Dutch) and a system which attempts standardization through a common classification method should take care of retaining this multi-language feature. INFOPLAN management is not always consequent in this matter.

Furthermore, in any broadly based classification scheme, lacunae become apparent once applied to specific subject areas. Management decisions need to be taken at this point to retain control. If such decisions are deferred and if a proper mechanism for thesaurus adjustment is not established, the best intentions for standardization go awry. The use of the macrothesaurus, whose original construction rested on an entirely different theoretical and conceptional foundation, makes this an especially important consideration. Again, INFOPLAN needs more professional awareness to cope with this problem.

Thesaurus management needs constant attention. A sufficient number of copies must be in the hand of every user, updates need to be distributed promptly (and again in sufficient numbers), cumulation of

revised editions must be issued as frequently as possible, questions which arise should be replied to by return mail, etc.

In this technical area (as in similar ones), this report can only point to some of the problems which arise during discussions, or whilst evaluating activities and documents. This is by no means an exhaustive treatment of the subject, its inclusion in the report should be interpreted as a recommendation for additional and more detailed study.

Recommendations

(1) To distribute a copy of the last available edition of the Macrothesaurus to every participating network node.

(2) To appoint, within CLADES, a staff member who carries the operational resonsibility for all questions and problems arising out of Thesaurus management.

(3) CLADES and perhaps also IDRC, should reach clear understanding with the Macrothesaurus management authorities (UN and others) regarding updates, revision processes, etc.

(4) Information about the Macrothesaurus and any comments relating to it should be published regularily, perhaps in the INFORMATIVO Bulletin.

Chapter III

Publications of INFOPLAN

PLANINDEX

The most visible product of INFOPLAN has been, until now, an abstract bulletin PLANINDEX. PLANINDEX was originally conceived to be a semi-annual publication which would reflect the contents of INFOPLAN's data base (CLAPLAN) and serve users who need a printed version of that data base. PLANINDEX production is wholly centered in Santiago where CEPAL's computer center manipulates the data and, after photocomposing the output, prepares print-ready copy from which another CEPAL division then prepares the publication.

Up to the present, five volumes of PLANINDEX have been published, the last two of them being annuals instead of the semi-annual issues originally planned. Until now, PLANINDEX has published abstracts of 3075 documents with an additional 1000 documents (approx.) in the production "pipeline". About 60% of the documents reported in PLANINDEX were derived from published sources, some 40% relate to "grey" literature. More than 2/3 of PLANINDEX entries originated in six countries of the region (Colombia, Costa Rica, Guatemala, Honduras, Panama, Paraguay), less than 1/3 from all the rest of Latin America (excluding the Caribbean). Several of the larger countries of the region (such as Brazil, Argentine, Venezuela, Mexico, Chile, and others) are conspiciously absent from this list. More than 1000 copies of each issue of PLANINDEX are distributed throughout the region, with what effect could not be ascertained. Nor was it possible to collect satisfactory data on subject contents and, more importantly, on users statistics.

Because PLANINDEX is as yet the "centerpiece" and showcase of INFOPLAN, at least as long as on-line services to the machine-stored data base are unavailable, some discussion of the publication must be made in this evaluation. The summary of findings is as following:

(1) Production processes for PLANINDEX are intolerably long, complex, costly and manpower-intensive. A very elementary systems analysis identifies some 29 work-steps in CLADES-Santiago;a thorough analysis would probably discover even more complexity. By any method of cost-effectiveness analysis, PLANINDEX is likely to receive very low marks; for cost-benefits measurements no data could be obtained.

(2) Although final product quality is high, production delays, input selectivity, slow turn-around times and lack of dialogue with users have reduced product utility considerably. Under such circumstances, the concept of product quality is open to questioning. An entry which is bibliographically and typographically well prepared and whose indexing is correct and exhaustive, but which becomes available long after it is needed, has lost most of its value. Glossy paper does not make for users receptiveness.

(3) It appears that computerisation benefits of PLANINDEX production have not yet been optimized. Few tables, if any have been produced, all checking is still done manually. Photocomposition is still rather time-consuming, and its real machine cost is high. Standard control procedures before, during and after production, have not been installed.

Recommendations

(1) To retain PLANINDEX, but to revise immediately all production processes in order to achieve acceptable quantitative and qualitative standards. IDRC might wish to assist CLADES in this task through professional help. The consolidation should preferably include a review of the computerized activities involved.

(2) To appoint one person in CLADES (with a substitute for vacations, etc.) to be concerned with PLANINDEX. All other CLADES personnel should no longer be directly involved.

(3) To investigate which PLANINDEX processes can be transferred with advantage to commercial operators. In view of the high salaries of CEPAL personnel, the outlook for considerable cost-savings seems to be very good.

(4) To investigate various trade-offs in PLANINDEX production such as indexing terms vs title amplification, indicative and other abstracts vs author abstracts, etc.

(5) To issue PLANINDEX as a quarterly publication. To return to each participating national focal point a printout of the national contribution every two months (and later on monthly) in an abbreviated format (finding list).

(6) To revise the mailing list of PLANINDEX. National distribution should always be through national focal points. The national focal point should be supplied with one copy for every national network participant and additional copies after consultation with CLADES. CLADES should distribute directly only in countries where no national focal point exists and then on a very limited basis. The introduction of a nominal fee for PLANINDEX subscription should be discussed.

(7) Most of these recommendations should result in considerable savings, especially in human resources. Some of these savings should permit a significant increase in PLANINDEX subject scope.

(8) Presently PLANINDEX is published in a general series and occasional country volumes. Country volumes should be

published on a regular basis, say when 200 entries have accumulated. Countries would thus have an incentive to increase their participation. Additionally, a series of subject-oriented PLANINDEX volumes should be introduced. subjects should be selected in consultation with ILPES and other users. As an example a PLANINDEX volume on Energy or on Transport, etc. seems to respond to users needs.

(9) PLANINDEX is presently mainly a tool for librarians. In order to demonstrate the use which can be made of it and also to enhance the communication of planning experience, the publication of an annual review of national and sectoral planning documents is recommended. The annual volume would contain:

a) An introduction by CEPAL/ILPES/CLADES on planning information services in the region.
b) Several chapters, each containing an analysis of national planning activities as represented in documents reported in PLANINDEX.
c) Several chapters, each containing an analysis of a subject-related information service.
d) A section of indexes reporting on persons and institutions active in planning. A subject index to the volume.

Each chapter should be concise (30 pages at most, including full bibliographic references). Work could be done as thesis assignments in senior ILPES courses or commissioned to academic researchers. Very stringent editorial control is a requirement for success. The Annual Review published by the American Society for Information Science (ARIST) is a good example for the proposed publication. A suitable editor as well as financial support sources need to be identified. To gain support for this enhancement of

INFOPLAN, approval from Ministers of Planning should be sought at their forthcoming Assembly.

INFORMATIVO Bulletin

The publications of this Bulletin started in 1984. Two series are produced:

INFORMATIVO INFOPLAN
INFORMATIVO TERMINOLOGY

The Bulletin, or Newsletter, is still experimental and no data are as yet available to permit an evaluation. Generally, the production of informal newsletters is considered to be a very effective means to advertise a service and to disseminate news of joint interest. It is suggested that INFORMATIVO Bulletins be used for that purpose and that CLADES make a special effort to develop this publication editorially as well as in frequency of publication. Eventually this may entail a complete change of the present editorial policy.

Recommendations

1) To combine the two series of INFORMATIVO Bulletin into one. The name INFORMATIVO INFOPLAN should be retained.

2) As a newsletter the Bulletin should preferably be short (about 4 pages each issue) and be frequently published. A publication frequency of 4 issues annually seems initially adequate.

3) The Bulletin should be directed to the general reader and to professionals in national focal points and networks. Editorially it should carry short news items (on planning or related fields)

in an easily readable format; a column with personal news; announcements of conferences, seminars, training and education; one or two reviews of significant publications. The information professional will want to find some news about national network activities; news about CEPAL, CLADES and ILPES; a column where terminology and thesaurus problems are dealt with; news about persons and organisations. A picture or two in each issue may be useful.

4) To appoint an editorial committee to decide on policy. A public relations expert should participate in this committee. The mailing list of the Bulletin needs considerable attention and should be adjusted according to the editorial policy which is adopted.

5) INFORMATIVO Bulletins are presently written in Spanish. Consultations should be held with CDC Trinidad in order to decide on an Engligh language issue which would be suitable for the Caribbean region. Present policy in which INFORMATIVO totally ignores Caribbean institutions and activities contradicts CEPAL's mandate and regional tasks and is eventually self defeating. CLADES should encourage and assist national networks who wish to publish an INFORMATIVO Bulletin on national affairs. A common format and layout and a joint editorial policy would increase regional network visibility.

Chapter IV

Some Additional Programs

Data Files - Non Bibliographic (DEVSIS II)

When DEVSIS was first designed during the early seventies, a distinction was made between bibliographic data on the one hand, and data bases which would report on analysed data and on reference material on the other hand. The alpha-numeric data in the reference file would be considered as DEVSIS level II material. Later developments of computers, telecommunications and of software have blurred the divisions between DEVSIS I and II considerably, and in most developed computerized facilities it would be difficult to decide to which level an activity belongs.

INFOPLAN started out as a DEVSIS II activity (a data base on information services and facilities). In Phase I its objectives were bibliographic, in II an objective of "experimenting" with non-bibliographic data was again introduced. This objective was described in very general terms, and no quantitative, qualitative or time requirements were set. The evaluation of the work which was done in CLADES in response to this objective can at best be described as a very elementary exercise to comply with the IDRC grant document. In any other circumstance one would expect such an exercise (and much more) to be an initial demonstration of activities on which a future grant application may eventually be based.

For its exercise CLADES has designed a data base on experts in planning, using an input the personal data of students attending courses of ILPES. In this design, data elements and their reporting parameters were defined, some sorting and search procedures were experimented with and a sample list of about 40 (forty) records was created. An input sheet was constructed and recently (December 84) "finalized". Eventually it is contemplated that a format for several

data collections would be constructed. Information on persons, facilities, courses, data bases, etc. would be collected and made available to users through a unified system for which a manual will also be written by CLADES. The systems development to be done by CLADES whould include small demonstration files, and the provision of training and technical assistance to national centers for systems installation.

No final decisions have yet been taken on the computer software to be employed. ISIS is judged to be rather complicated and unwieldy for this type of application, and initial experiments were made with CARDBOX. This software package is more flexible and easier to use than ISIS, but has limitations which may affect future data base development. Another possibility which is considered, is a package now developed with UNESCO grants by an Austrian institute. This package called IV + V is said to be transferable to several makes of micro- and minicomputers and to be rather responsive to various types of DEVSIS II files. IV + V has not yet been finally released.

CEPAL now maintains the following computerized data bases:

1) CLAPLAN - from which PLANINDEX is produced. The data base contains 1875 records, PLANINDEX items prior to 1982 are not retrievable.
2) BIBLIOS - is the registry system of CEPAL's library holdings. It contains 7250 records.
3) DOCPAL - represents documents available in the library of CELADE (Population and Demography). About 5200 records are searchable.
4) CARIBE - CARISPLAN documents compatible with the common system. Contains approx. 1300 records.

These are, of course, bibliographic files but they contain information about experts, institutions, activities, etc. which could

easily form a basis and experimental foundation for reference data file development.

To sum up there has been no DEVSIS II activity or experimentation as yet to evaluate, some basic thinking yes, but no field work worthy of note.

Recommendations

1) Reference files should be developed as soon as possible, probably within the range of a special project with well-defined objectives. Files should be responsive to national and/or to regional needs. Some demand has been expressed about the following areas: Statistical information sources, databases, human resources, institutions, information facilities, specialists and consultants, courses, conferences and seminars, government organisations.

2) The methodology should be worked out, hardware and software be defined, manuals be written, training is to be provided. At least initially, it seems that much of the methodology which has been used by other organisations, such as various Latin American, subject oriented data collections (See list in Annex), U.N. organisations, OECD and others, can be transferred. It is also likely that much of the required software can be found ready-made, especially if systems are to be installed on standard-type machines (such as IBM PC's or compatible hardware). For some of the related activities such as software packaging, compilation of manuals, data entry of historic files, etc., contracts with commercial organisations may well be cost-effective.

3) Any system which is developed should pay due attention to the need that reference files must be constantly updated in order to remain useful. Levels of updating are different at the national and at the regional level and also vary with subject contents.

4) If project management for this type of files is placed at the regional level, it is suggested that development should be done rather unilaterally and that international or regional concensus on methodology and technology is not absolutely necessary. A different procedure might make it impossible to keep pace with worldwide information technology whose rapid development makes fast decisions imperative. Systems which serve not only for purposes of demonstration, but also fill a practical need (such as serving ILPES needs) are to be preferred.

5) These recommendations, contain some initial thoughts for the development of a comprehensive project on this topic. If INFOPLAN is to develop into a regional DEVSIS type system, such a project seems to warrant priority.

A Focal Point for Modern Information Technology

Socio-economic information is derived from a great variety of sources, widely dispersed.Some of these sources are numerate, others are textual. Information needs for specific applications are difficult to define and it is frequently impossible to predict the information source in which specific data can be found. There are few standards which have yet been established for handling this type of

information and, given its amorphous nature, it is doubtful that standardization will play a significant role in meeting the future information needs in this area. (This statement refers to general information. In specific subject areas, such as economics, statistics, etc., the application of standards is a sine qua non.)

Modern information technology has provided socio-economic information users with improved methods to meet their increasing needs. Computing machinery of various types and sizes, either stand-alone or in network configurations, are used in combination with sophisticated message handling devices and telecommunications in order to store and control socio-economic information and gain access to it.
In developed countries, information storage and retrieval in this area is rapidly becoming predominant and is being used extensively as a vital tool to support relevant decision making. The decisions which are directly affected concern not only problems of academic interest, but those of immediate impact, such as trade, employment, economic policies, industrial and agricultural development, etc. The application of modern information technology is a precondition for this development.

In the Latin-American region and directly related to the DEVSIS type of information which IDRC wishes to emphasise, better methods to cope with modern information technology seem to warrant priority. A recommendation to this effect was substantiated by every visit made during this mission, as well as by the discussions reported in the 1984 seminar on microcomputer use for bibliographic applications in Santiago, and also by IDRC funding activities as represented in its recent grants to CARISPLAN.

Considering present and planned activities, I suggest that any attempt to advance the use of national, sectoral and international socio-economic information should be combined with an effort towards optimal utilisation of modern information technology coupled with an attitude towards harmonisation and attempts at compatibility.

In view of the national economic, social, educational and political factors which are involved, and also considering market forces, the most pragmatic solution to the dilemma described is probably the creation of a focal point which specialises in modern information technology. Such a focal point could be relatively small, perhaps consisting initially of a single person. The focal point should acquire as much knowledge as feasible (not necessarily through actual operational expertise) in the many areas related to this technology (computing hardware and software, communications, the handling of bibliographic and other types of information, etc.), and serve in an advisory and clearing-house capacity to interested users in the region. The focal point would have to be equipped with the necessary professional literature, means to travel and to attend conferences, publication of a newsletter, etc. Equipment-wise access to a small-configuration PC would be desirable as would be access to a terminal connected online to worldwide information resources.

Acceptance of the focal point by countries in the region probably requires its staffing by indigenous personnel. Qualifications should include education (or experience) in both information work and computing and an orientation towards giving service to others. Good knowledge of Spanish and English is a basic requirement.

It is suggested that the focal point should be maintained in ECLAC in order to interface optimally with CLADES, ILPES and the CDCC and to utilise best their facilities, contacts, activities and regional prestige. Organisationally it is recommended to be placed in CLADES but to be closely liaisoned with the Computer Center of CEPAL.

An exact working plan and procedure needs to be drawn up. Once this has been formulated, some support for the initial running-in is recommended, provided that a clear commitment is obtained which guarantees the operation of this unit on a long-term basis.

Recommendations

(1) To support, within CLADES, the activities of a focal point for modern information technology. Such support should be conditional on CEPAL assuming infrastructural expenses (salaries etc.), and grants to be reserved for current operational expenses (training, travel, literature, some equipment, etc.).

"Point-of-use" Financial Support

CLADES has rightly adopted a decentralised approach for INFOPLAN related activities. The size of the region, number of countries involved, cultural, political and economic diversity of nations, and the differences in (information) professional capabilities, would have made any other approach unworkable over any length of time.

The decentralised approach is based on a network of national focal points which in turn maintain national networks. Any chain is as strong as its weakest link, and in this case the capabilities of the national focal points to activate national networks, to keep them involved, to get them to collect information and generate interest by users, are all pervasive. CLADES failed in giving proper consideration to this aspect.

Assigning some financial capability and reponsibility to national focal points would probably encourage and strengthen their activities,. All focal points visited operate nowadays without any budgets to support INFOPLAN related activities, and even paltry sums (such as ten dollars in the case of Paraguay) are often a stumbling block. A financial capability is likely not only to support activities directly but also to enhance the prestige of the organisation and thus provide even larger benefits indirectly.

In encouraging DEVSIS and INFOPLAN related activities, a small allowance to selected participating National Focal Points might be considered with advantage. Such an allowance could take the form of contributing a nominal sum to the material costs of training activities and some assistance towards the cost of producing the national data base.

It is believed that such an allowance, given either directly by IDRC and indirectly through CLADES, could have a significant multiplying and stimulating effect and achieve at a small outlay (say $2000-3000 annually for each country for a period of 2-3 years) much more than many large scale alternative financing schemes.

If such an approach is selected, it is suggested that financing be directly linked to performing operations and to actual operations and if a continuous activity is involved (such as completing worksheets), it should support only the initial training and running-in period. It seems also essential that these grants be handled with an absolute minimum of burocracy and within a very short response time. If grants are provided by IDRC (to my mind preferable) reporting and control procedures should involve CLADES in order to emphasize the latter's coordinating position.

In the case of Argentine and Paraguay, this approach would immediately strengthen the existing systems. This probably holds true for some other countries as well.

Recommendations

1) Financial grants to CEPAL/CLADES for INFOPLAN development should include some assistance to national focal points/networks. Such assistance should be earmarked in the grant documents and should serve the following objectives:

- Provide the national coordinator with some financial means which can be expended on activities of a purely national character (such as: meetings, an internal Bulletin, hiring assistance or expert services on a temporary basis, etc.).
- The development of services to users and some on-line searches of INFOPLAN and related systems.
- Financial assistance to local training activities.
- To enhance the standing and prestige of the recipient organisation by being able to demonstrate that international organisations consider the Focal Point important enough to receive direct financial assistance.

Any financial grant under this heading should be directly product-related and detailed in an annual workplan. It should not include assistance for salaries, travel abroad, equipment purchases or any other item of an infrastructural character. The financial assistance envisaged in these recommendations amounts to about 2000-3000 Dollars annually for active national networks.

2) If the recommendation for national-level computerization is taken up, additional support will be necessary. But here as well financial support should not exceed the cost of hardware and software and some initial training. Current operation should remain a national obligation.

Chapter V

Country Reports

Country Reports

During the evaluation mission I visited several national focal points and networkers coordinators (Colombia, Paraguay, Trinidad and Tobago, Panama and Costa Rica). I had first-hand reports on two additional countries (Argentine and Chile). On these countries I have reported in some detail in the following pages. No country report was made on the network in Trinidad and Tobago because activities there are so closely interwoven with CARISPLAN that a separate report seemed inappropriate.

Argentine

A very detailed report on that country has been submitted by Dominique Babini (dated March 1985). Activities in Argentine are mentioned here shortly for completeness only and Babini's report should be the source for any thorough study.

Until 1984, CEPAL/CLADES operated in Argentine under conditions similar to those still experienced in Chile, i.e., CEPAL was under a political cloud and official contacts with it were extremely limited. Unofficially and professionally, Argentine information workers cooperated rather enthusiastically with CLADES and most of the latter's initiatives were well received. In Argentine, the CLADES initiative resulted in a significant stimulation of socio-economic information activities in general, creating for this area a professional environment similar to the one which, until now, had only existed in the natural sciences and technology.

INFOPLAN and its related activities are viewed in Argentine, as well as in Chile (and probably several other countries) rather broadly and not at all in the sense of the very narrow subject scope adopted by CLADES. It seems that CLADES was instrumental in stimulating a positive attitude towards DEVSIS type activities as well as to networking and standardisation. CLADES has also given information professionals the international legitimation they need in order to gain more positive attitudes from their users and the organisations within which they work. In future, CLADES may probably expect considerable inputs from the Argentine national network, not only in the form of input sheets for PLANINDEX but much more importantly in cooperation with it by professionals and the establishment of a real regional dialogue which is so essential for systems survival .

The dissemination of Babini's report to CLADES is recommended with special emphasis on the proposals B19-B22. All these proposals seem relevant for serious discussion and consideration.

Chile

Due to a political decision of the Chilean government, cooperation between Chilean official organisations and ECLAC/CEPAL is minimal. Chile has not established formally a National Point for INFOPLAN, nor was I able to consult, officially, with Chilean authorities on CLADES and its activities.

I was nevertheless able to gain a fair impression of that country's participation in INFOPLAN and in related activities. I was led to believe that CLADES-INFOPLAN activities have made a considerable impact on socio-economic information services development in Chile. National activities related to this area have been identified, service providers and users have been trained in relatively considerable numbers, CLADES methodologies have become an informal standard, and cooperation with CEPAL/CLADES professionals is a constantly ongoing activity, mutually beneficial.

Chile was one of the first countries in Latin America to recognise the importance of national information networks and the role they are supposed to fill. During the early seventies, efforts were mainly directed towards the natural sciences and technologies. Due to the quality of Chilean information professionals, this activity produced better than average results. I have gained the impression that a similar effort has been directed during the past few years towards the establishment of a very broad range of socio-economic services. It seems that the constant interaction with CLADES was a primary moving factor in this. I assume that if in future political relations between Chile and CEPAL improve, a very active participation of Chile in INFOPLAN can be expected, expressing itself not only in INFOPLAN's present activities but also in a mutual transfer of professional experience, which should benefit both sides.

A detailed description of INFOPLAN's impact on Chile was prepared on my request and is enclosed in the Annex.

Colombia

The concept to establish a national networking activity, to be coordinated by the director of the library in the National Department for Planning, followed a relevant decision taken by the planning ministers of the region in 1977.

ILPES and CEPAL/CLADES first spelled out the mode of operation in 1979 and a first training course took place in Colombia, in 1982. Many participants in this seminar changed positions after a change in government and an additional course was necessary in October 1984, in order to train personnel needed to activate the network.

The network is presently still rather fragile but seems to be operational. One person on the library staff is responsible for current activities (in addition to other duties). Network members expect to meet every few months to coordinate activities and for training sessions.

About 120 worksheets have been supplied until now to CLADES (for statistics, see relevant section), and about 40 entries are expected to be mailed bi-monthly. These worksheets relate to publications which are available in libraries to the general public. Such publications represent only a small fraction (perhaps much less than 10 percent) of documents which are relevant to INFOPLAN's subject scope. It seems that many documents are restricted for circulation or otherwise, are not available to Colombian NAPLAN network members.

PLANINDEX is used in the library; frequency of use and purpose could not be ascertained. No users statistics of any type are available. Two (2) document requests to CLADES were satisfactorily dealt with.

The main points made by the NAPLAN coordinator are:

a) CLADES has been the catalyst for the networks formation. Network survival chances seem slim if CLADES were to cease activity in this field. The more pressure CLADES can bring to bear, the better the national output to be expected.

b) INFOPLAN standards for information handling have been accepted by all network members, and a future standardization of bibliographic input formats may well result.

c) A much faster turn-around-time for PLANINDEX is necessary. A larger number of PLANINDEX copies should be sent to Colombia, at least one copy for each relevant participant.

A visit to one network participant (Foundation for Higher Education) confirmed most of the previous statements. Here a point was made on the important role which the local Chamber of Commerce has in socio-economic information services, a role not always compatible or complementary to the role assumed by the network. The restricted subject scope of PLANINDEX and its lack of timeliness detract considerably from its value and are likely to make it even less attractive in future.

A copy of the first information circular issued by the national network is enclosed in the Annex. The circular describes some recent activities and lists the member organisations of the network.

Costa Rica

The national focal point for INFOPLAN is located in the Dept. of Information in the Ministry for Planning and Economic Policy (MIDEPLAN). The department of information is divided into three divisions: CEDOP = Center of Documentation, Statistics, and Computing. INFOPLAN is handled by CEDOP.

CEDOP has been without a director for the last 3-4 months. The director's job is likely to remain vacant because government aims to restrict the number of employees. The directors responsibilities have been transferred to the deputy director of the department (a statistician), in addition to her other duties. Because CEDOP's director is also the coordinator of the national INFOPLAN network, the vacancy's implication was a virtual cessation of activities. The documents of the ministry itself are still being analysed, and worksheets are prepared and sent to CLADES. Other participating organisations are much less active than in the past.

Through the use of the Ministry's computer (a Honeywell), CEDOP maintains fair control of the literature entered into its library collection. Finding lists of newly entered material are regularly prepared and every 4-5 months a cumulation of holdings is printed.

I met with the leading network participants and we agreed that until a new network coordinator is appointed, Mrs. M. Rios (dept. director, department of information) would handle administrative matters and Mrs. Echavaria would coordinate professional activities.

The role of CLADES was generally believed to be crucial, also for further activities. CLADES connection and support is absolutely necessary in order to get resources and even an allowance of time, etc. from head organisations. They eagerly anticipate additional assistance in training. PLANINDEX is in considerable use and a special

issue of PLANINDEX Costa Rica is very much hoped for. Complaints are those heard everywhere: not enough copies of the Macrothesaurus, insufficient numbers of copies of PLANINDEX, the need to revise PLANINDEX mailing list, slow response time, need for faster turn-around of worksheets.

For the future, they would like the idea of being able to conduct their own training and also a possibility to get some limited financial resources which can be used to advance network activities. If fully active, they believe they could contribute several hundred entries each year (one estimate was up to 700 entries).

ICAP personnel could not be reached. Their offices were visited, but the one person who knows something about INFOPLAN was abroad.

Panama

This is a very active network, having supplied during 1984 more than 370 entries into INFOPLAN (using the TRB format). In addition to the preparation of the material for CEPAL/CLADES, the bibliographic part of the input (minus abstracts) is used to prepare a national bibliography on the subject of planning. Four issues of this Bulletin have been published until now.

Participants in the national newtwork meet about every two months in order to exchange experience and resolve problems which they encounter. Seven such meetings have been held.

PLANINDEX and especially PLANINDEX-PANAMA are highly regarded and very useful. Although it is estimated that about 30-40% of the relevant material is presently not included (publication restrictions) it is felt that the additional knowledge available through the system is worth the effort. They expect that more than 200 items will be added in 1985.

Problems are similar to those encountered elsewhere. Slow turn-around time, insufficient copies of PLANINDEX and Macrothesaurus, unsatisfactory mailing list. They would prefer to be more independent of Santiago and an initial request for assistance to achieve that was handed to me.

Paraguay

My report on my visit in that country starts with the non-conventional statement that if I were looking for a national information environment where most could be achieved with the least measure of assistance, Paraguay holds promise. In an environment which lacks the most rudimentary tools for information handling, where the making of photocopies is an insurmmountable barrier, where training in advanced systems is an unattainable dream and foreign experts are rarely, if ever, seen or heard, I found a lively and functioning national information network, engaged in some very solid activities. I found a good self-improvement program, sound ideas about relations to users, a serious attitude to library cooperation, confidence in their own ability - all the result of bootstrapping in its most positive form. I have not seen a poorer facility anywhere in Latin America and none could boast of a better input-output relationship.

The present network got its start in 1980 when a documentation unit was created in a "Population and Regional Development Project". The unit was incorporated in 1982, into the Secretariat for Planning. Following a travel grant to attend an INFOPLAN training seminar (1981), a local seminar with 25 participants was organised (1983), followed by a second one in 1984. A national network has emerged in which 27 institutions participate. This network deals not only with INFOPLAN but also with library cooperation and other activities designed to improve information services.

The CLADES initiative was decisive in motivating the Secretariat of Planning to support its documentation unit and to enable it to participate in INFOPLAN. The prestige (and legitimation) connected with recognition by and cooperation with an informational organisation of the stature of CEPAL created a positive environment in which the necessary official support for network formation and operation was assured. Fortunately, the network coordinator (in the Secretariat of

Planning) was very efficient and effective and succeeded in building an activity which not only supplied INFOPLAN entries but also used the information to assist planners and other users. The services supplied generated strong user support, and the publications produced (acquisition lists, abstracts of documents, Spanish language summaries of relevant documents published abroad, access to network members, etc.) are highly appreciated. The strong and effective leadership has created a networking climate which holds good promise for the future.

Quite a few lessons can be learnt from the Paraguay experience:

a) CLADES and CEPAL are effective (and indispensable) catalysers for national network formation and its continuous support.

b) An effective and knowledgable network manager is needed for network activation and maintenance.

c) The sum-total of financial support is probably less important for success than a sound attitude to users services and to a cooperative relationship with network members.

d) The network management must be able to include into the data base information items which its users require. It cannot be constrained too strictly by a narrow subject scope, especially if the subject scope was set by a far-away organisation and no mechanism for revision exists.

e) Continuous international support is still needed for building the activity. This support should be very sensible to local needs, including trivials such as worksheet supply and sufficient copies of publications, but also fundamentals such as training support, a partnership approach, etc.

Recommendations

1) The Paraguay experience reinforces the general recommendation to experiment with more direct point-of-use financial support. A specific request (recommended for action) was submitted separately.

2) For CLADES to be very sensitive to needs of networks participating in INFOPLAN and to establish a mechanism which would facilitate the new approach.

ANNEX A

INFOPLAN Chronology

ANNEX A (1)

Principal INFOPLAN Activities by CLADES 1976-1985

1976
- Information on socio-economic information resources inventory distributed
- Pre-questionnaire design and missions to various institutions
- Pilot project in Chile
- Cooperative arrangements with CEPAL and others
- Data base creation using ISIS
- Questionnaire design in various languages

1977
- Questionnaires to countries and receipt of replies
- Training seminar with INTAL
- Processing of questionnaires and publication of initial directories
- National training seminars
- Preparation of a bibliography of integration documents published in Latin America and the Caribbean

1978
- National seminars on information resources
- Publication of a regional directory on socio-economic information resources

1979
- Publication of an analytical report on socio-economic information facilities in Latin America
- Publication on the terminology of integration
- Draft design of INFOPLAN
- Meeting with planners to discuss draft design
- Experimental issue of PLANINDEX
- Advisory mission to Caribbean Documentation Center (CDC) to plan CARISPLAN
- 3 missions to 12 countries regarding INFOPLAN

1980
- New Worksheet (CLADES and DOCPAL)
- Regional meeting of Ministers (Nov. 1980) accepts INFOPLAN
- Second issue PLANINDEX

1981
- Seminars in the Caribbean sub-region on socio-economic information infrastructure
- Joint CLADES/UNESCO-PGI seminar (Evaluation methodology of infrastructure)
- Manual of common bibliographic system
- Design of guidelines for the selection and analysis of inputs into INFOPLAN
- Second seminar of national focal points
- First seminar of national networks
- Technical meeting in Panama
- PLANINDEX production

1982
- PLANINDEX production
- INFOPLAN integration with the bibliographic system of CEPAL and DOCPAL
- Seminars in Central America
- Regional meeting of national focal points on the evaluation of INFOPLAN

983
- Seminars in Central and South America
- PLANINDEX production
- Publication of Manuals on the selection of information and use of macrothesaurus

984
- First publication of INFORMATIVO Bulletin
- PLANINDEX production
- Seminars in Central and South America
- Reference data base - Planning specialists
- Reference data base - Manual and document selection

CDC ACTIVITIES UNDERTAKEN FOR THE PERIOD 1979-1984

1979

28 May - 8 June	Training workshop for Library and Information Personnel in Ministries of Planning and Development in documentation techniques for economic and social planning information. Port-of-Spain, Trinidad.
16-19 July	Visit to IDRC Library and Information Sciences Division.
15-17 August	Visit to Ministry of Finance Library, Trinidad, to study progress made since workshop and discuss problems encountered in collection development and organization.
21-23 August	Visit to Suriname.
24-26 August	Visit to Guyana.
28 August - 2 September	Visit to Barbados.
2-5 September	Visit to Grenada.
5-9 September	Visit to Dominica.
9-13 September	Visit to Antigua.
13-15 September	Visit to St. Kitts.
23 September - 3 October	Visit to Dominican Republic.
10-17 October	Visit to Cuba.
18-24 October	Visit to Jamaica.
11-13 November	Visit to Grenada.
2-13 December	Barbados (Mission).

1980

6-11 January	Mission to Jamaica.
11-16 January	Mission to Cuba.
16-30 January	Mission to Jamaica.
30 January - 9 February	Mission to Haiti.
12-22 February	Mission to Dominican Republic.
8-18 March	Mission to St. Kitts.
18-29 March	Mission to Dominica.
29 March - 6 April	Mission to St. Lucia.
6-15 April	Mission to Grenada.
15 April -	Mission to Antigua.
13-16 October	Mission to St. Vincent.
28-31 October	Mission to Belize.
24 November - 5 December	Regional Workshop on Techniques for Effective Participation in CARISPLAN. Port-of-Spain, Trinidad.

NB. Missions/visits undertaken to:

a) Assist CDCC Member Governments in establishing or strengthening their information facilities in the field of socio-economic planning, by providing advisory services to their information specialists in all areas of library and documentation works;

b) Assist the information specialists in preparing contributions to the network, especially at the initial stages of development; and,

c) Organize training courses for the information personnel of these centres.

1981

9-13 February	Workshop on Indexing and Abstracting. Kingston, Jamaica.
16-24 February	Mission to Jamaica. Assistance to NACOLADS - review progress of SECIN.
9-13 March	Workshop on Techniques for Effective Participation in the Caribbean Information System. Wildey, Barbados.
12-17 April	Mission to Guyana. Promote use of system by senior officials - expansion of participation.
28 April - 2 May	Mission to Grenada.
25-29 May	Workshop on Indexing and Abstracting Techniques. Georgetown, Guyana.
12-18 June	UN.DIESA/ISU Meeting to promote the use of more compatible methods of efficient exchange and dissemination of information.
15-26 June	Workshop on Basic Techniques for Library Organization. Kingstown, St. Vincent.
27 June - 2 July	Visit to UN/ECLA, Santiago, Chile.
5 August - 13 September	Training of 3 Library students from UWI.
19-23 October	Regional Workshop for Inventory of Development Information Units. Wildey, Barbados.
26-30 October	Mission to Jamaica. Indexing and Abstracting Workshop to expand participation in the system. Discuss use of CARISPLAN techniques in future automated technical services in Jamaica.
3-13 November	Ottawa Meeting on Common Methodologies. Ottawa, Canada.
6-18 December	Mission to Montserrat. Technical assistance in the organization and development of Library in the Development Unit.

1982

1-13 February	Mission to Dominican Republic. Terms of reference: determine priorities for an information development plan; determine needs for training; identify possible sources of finance.
8-9 March	Mission to St. Vincent. Review developments in the information services; discuss request for scholarship; discuss plan for National Information System.
28 March - 1 April	Mission to the Netherlands Antilles. Extend benefits of participation in CARISPLAN; design structure and activities leading to the co-ordination and dissemination of information in the 6 islands and their participation in CARISPLAN.
2 May - 12 June	Six-week specialized in-service training for St. Vincent government librarian to enable her to undertake responsibility of National Documentation Centre and CARISPLAN National Focal Point.
14-21 May	National Workshop on Techniques for Effective Participation in CARISPLAN. La Habana, Cuba.
9-11 June	Mission to Antigua. Assess information needs of the OECS Secretariat and outline activities and infrastructure for the provision of an information service.
19-24 July	Regional Workshop on User Education Techniques for Use in Special Libraries. Kingston, Jamaica.
September - 2 October	Dominica. Technical assistance in the development of a documentation centre to serve government.
11-15 October	National Workshop on Techniques for Effective Participation in CARISPLAN. Santo Domingo, República Dominicana.
25-29 October	National Workshop on Techniques for Effective Participation in CARISPLAN. Port-au-Prince, Haiti.

1982 (cont.)

8-12 November	National Workshop on Techniques for Effective Participation in CARISPLAN. Paramaribo, Suriname.
4-14 November	Suriname Mission.
2-16 December	In-service training of the librarian of Stichting Planbureau at CDC.

1983

27 February - 1 March	*Mission to Grenada.
1-4 March	*Mission to St. Vincent.
4-8 March	*Mission to Dominica.

* All three undertaken to discuss elements of project proposal for submission to IDRC

4-20 March	In-service training for Librarians from Grenada and Montserrat at CDC.
18-29 March	Mission to Belize.
24-30 May	National Workshop on Techniques for Effective Participation in CARISPLAN. Port-of-Spain, Trinidad.
5-8 July	Evaluation Meeting on the Caribbean Information System. Port-of-Spain, Trinidad.
31 October - 5 November	Mission to Dominica. Preparation of project proposal for a national documentation centre and improvement of the national information system.

1984

16-20 January	Workshop on Techniques for Effective Participation in CARISPLAN. Kingston, Jamaica.

In the period January-March:

a) Technical assistance in the drafting of project proposal for submission to IDRC was provided to Montserrat; and,

b) WIPO/ECLA/CARICOM Inter-secretariat mission to assess the industrial property situation in some territories of the region.

1984 (cont.)

14-18 May	In-service training for Miss G. Burke of Jamaica at CDC.
14-18 May	Attendance at Workshop on Energy Information Systems. Port-of-Spain, Trinidad.
22-25 May	Participation in the Second Technical Expert Group Meeting on Common Indexing Tools. New York, USA.
25 June - 31 July	Attachment of two library school students at CDC.
18-30 November	In-service training for two librarians from national focal point Haiti.
26 November - 6 December	Caribbean Science and Technology Network (CARSTIN): Training Workshop/Seminar on Network Development in the Caribbean. Port-of-Spain, Trinidad.

ANNEX B

Tables and Charts

Table B (1)

Total IDRC and Recipients investments into. INFOPLAN / CARISPLAN
(all sums in CAD) todate (March 1985)

Source doc.	Date approved	Phase	I D R C	Recipient
3-P-78-0098	16/12/78	CARISPLAN I	95,177	44,000
	/6/80	Suppl.	51,288	
3-P-80-0155	15/1/81	CARISPLAN II	456,707	185,800
	1/12/82	Extension	53,500	
3-P-80-0155(S2)	28/6/83	Suppl.+revision	193,000	
3-P-84-0207	18/1/85	CARISPLAN III	478,520	317,915
	Subtotal		1,328,192 CAD	547,715 CAD
	Total CARISPLAN todate		1,875,907 CAD	
3-P-75-0008	15/3/75	DEVSIS LA	187,100	26,700
3-P-75-0008(S1)	15.9.77	Suppl.	85,125	
3-P-78-0162	15/9/78	INFOPLAN I	280,900	77,000
3-P-80-0154	15/1/81	INFOPLAN II	513,889	319,100
	Subtotal		1,067,014 CAD	422,800 CAD
	Total INFOPLAN todate		1,489,814 CAD	
	Total DEVSIS LA		3,365,721 CAD	
	of which IDRC		2,395,206 CAD	

Remarks: 1) This tabulation includes funds which have been committed but not yet expended (CARISPLAN III).

2) The total amount committed and spent is probably much higher because:

(a) Fund administration costs of IDRC and of Recipients are not included.

(b) Recipients investment into. INFOPLAN todate is probably larger than indicated in grant documents.

Table B (2)

INFOPLAN Expenditure - IDRC Funds (27.2.85)

Expenditure	Phase I (percentages)	Phase II (percentages)
Personnel	45.65	53.49
Travel	9.08	6.27
Training & Seminars	24.10	25.01
Equipment	6.51	3.45
Misc.	2.71	—
Overhead	11.95	11.78
Total	100.00	100.00
Total in US $	200.539$	482.514$

*Other funds: US$ 386.100

Information supplied by CEPAL accounting section.

Table B (3)

INFOPLAN Personnel - Men/Days (men/years)

Year	IDRC financed		CEPAL financed	
1980	469.0	(1.86)	353.5	(1.40)
81	523.5	(2.08)	207.0	(0.82)
82	563.0	(2.23)	465.5	(1.85)
83	336.0	(1.33)	591.0	(2.35)
84	215.5	(0.85)	788.0	(3.13)
Total	2.107.0	(8.36)	2.396.0	(9.51)

Remarks:

(1) Includes financial participation by ILPES of about 15%

(2) Based on an estimate of 252 man/days = 1 men/year

(3) Figures were provided by CLADES. An analysis of figures shows that they do not include "overhead" such as vacation, sick leave, etc. The real figures are at least 25% higher.

Table B (4)

Summary of INFOPLAN activities in the Region

(Jan. 1981 - Feb. 1985)

Activity \ Country	AR	BO	BR	CO	CR	CL	EC	SV	GT	HN	MX	NI	PA	PY	PE	TT	UY	VE
1. Preparation of the infrastructure																		
1.1 Training courses & seminars	1		2	2	2		3		2	2			2	2		1		1
1.2 National focal point establishment	X		X	X	X				X	X			X	X	X	X		X
1.3 NAPLAN networks	X		X	X	X				X	X			X	X	X	X		X
1.4 Info/ Centers for Planning	X													X				
1.5 Support to Info. Centers for Planning			X	X	X				X	X			X					
2. Utilisation of INFOPLAN technology																		
2.1 Use of manuals	X		X	X	X		X	X	X	X			X	X			X	X
2.2 Use of worksheets	X		X	X	X		X	X	X	X			X	X				X
2.3 Use of macrothesaurus	X		X	X	X		X	X	X	X			X	X				X
3. INFOPLAN products																		
3.1 Worksheets produced	36		62	158	790		28		428	174			284	103			13	22
3.2 Abstract journal					X				X	X			X					
3.3 Alerting Bulletin			X						X				X					
3.4 Bibliographies			X	X									X					X
3.5 Planning terminology study			X	X		X									X			X
4. Institutional info. policy																		
4.1 Planning and programming	X		X	X	X				X	X			X	X				
4.2 Organisational changes	X				X				X									
4.2 Augmentation of info. resources					X								X	X				

Table B (5)

Estimate of INFOPLAN impact on socio-economic info. systems in Latin America

(Jan. 1981 - Feb. 1985)

Activity \ Country & Region	AR	BO	BR	CO	CR	CL	EC	SV	GT	HN	MX	NI	PA	PY	PE	TT	UY	VE	Sub - Regions CARIB.	CEN.AME.	S.AME.
1. Preparation of infrastructure																					
1.1 Training of personnel	X			X	X	X	X		X		X		X				X	X		X	X
1.2 Information Center Creation											X										
1.3 Strengthening info. Centers	X				X	X	X		X				X	X				X			
2. Introduction of working tools																					
2.1 Use of manuals	X				X	X											X				X
2.2 Use of worksheets	X				X	X											X				X
2.3 Use of macrothesaurus	X				X	X											X				X
3. Information products																					
3.1 Abstract journals																					X
3.2 Alerting Bulletins																					X
3.3 Terminology studies	X																				
4. Information Policy Changes																					
4.1 Planning and programming	X						X				X		X	X						X	
4.2 Organisational changes	X						X							X						X	
4.3 Increased resource allocation	X																				

INFOPLAN TRAINING SEMINARS

Place	Dates	Participants	Countries represented*
Santiago	1980 14 Jul-1 Aug.	28	BR,CO,CR,CL, GT,MX,PE,VE
Santiago	1981 11-29 May	22	BO,BR,CR,GT,HN, PA,PY,PE,UY,VE
Quito	1981 29 Oct.-20 Nov.	38	EC
Panama	1981 30 Nov.-2 Dec.	6	CR,GT,HN,PA
Asuncion	1982 21-26 March	24	PY
Barquisimeto	1982 17-21 May	14	VE
San Jose	1982 24-29 May	24	CR
Tegucigalpa	1982 23 May-5 June	23	HN
Guatemala	1982 7-11 June	28	GT
Panama	1982 14-18 June	22	PA
Quito	1982 21-25 June	16	EC
Santiago	1982 11-13 Nov.	2	TT/CDCC
Bogota	1982 22-26 Nov.	21	CO
Brasilia	1983 25-29 April	21	BR
Guatemala	1983 16-29 Oct.	26	GT
Tegucigalpa	1983 31 Oct.-17 Nov.	17	HN
San Jose	1983 14-25 Nov.	28	CR
Panama	1983 5-16 Dec.	19	PA
Bogota	1984 1-5 Oct.	29	CO
Asuncion	1984 13-23 Nov.	33	PY
Quito	1984 19-30 Nov.	70	EC
Brasilia	1984 26-30 Nov.	25	BR
Buenos Aires	1984 3-7 Dec.	27	AR
		Total: 563 participants	15 countries + Caribbean

* Country abbreviation follows ISO code.

Table B (7)

Follow-up Visits Concerning INFOPLAN Installation *

	1981	1982	1983	1984
Number of Journeys	8	10	5	5
Countries visited:				
Argentine	1	1		3
Bolivia	2			
Brazil	2	1	2	4
Colombia	2		2	2
Costa Rica	2	3	1	1
Equador	2	1		2
Guatamala	3	2	1	1
Honduras	2	3	1	1
Mexico	3	2	1	1
Nicaragua			1	
Panama	3	3	1	1
Paraguay	1	2		2
Peru	1	1	2	
Trinidad & Tobago		1	1	
Urugay	2	1		
Venezuela	2	1	1	2

*Consolidated data for the period prior to 1981 were not available

COOPERATION OF INFOPLAN WITH OTHER REGIONAL AND INTERNATIONAL INFORMATION SYSTEMS

Table B (8)

	TECHNICAL COOPERATION			DOCUMENT INPUT		
	Worksheets	Consul-tation	Training	Worksheets	Other Formats	Documents
AGRINTER	-	-	-	-	X	-
ALIDE	X*	X	-	-	-	-
ASIP	-	-	X	-	-	X
BIREME	-	-	-	-	-	-
CLAD	X*	X	X	-	-	-
CIDE	X*	X	-	-	-	-
CINTERFOR	X	-	X	-	-	-
CRESALC	-	X	-	-	-	-
CSUCA	-	X	X	-	-	-
ICAP	X	-	X	X	-	-
ILANUD	X	X	X	X	-	-
INFOTERRA	-	X	X	-	-	-
JUNAC	X	X	-	-	-	-
LATINAH	-	X	X	-	-	-
PROY.PRIN.EDUC.	-	X	-	-	-	-
OLADE	-	X	X	-	-	-
REPIDISCA	-	-	-	-	X	-
SIECA	X	X	-	X	-	-
SIDREE	X	X	X	-	-	-

* With modifications

Table B (9)

National inputs into. CLAPLAN and CLADES
document collection

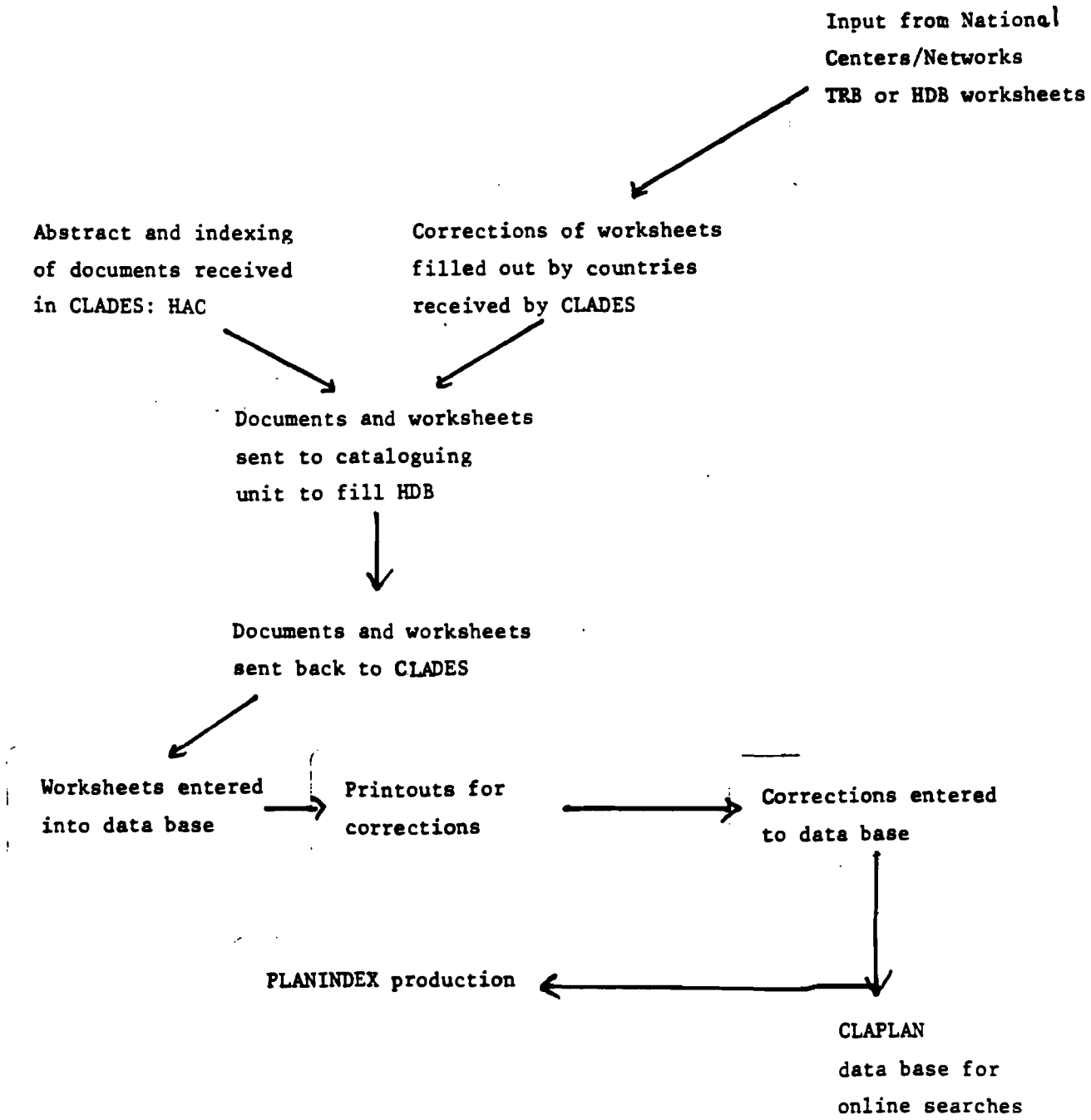
	Worksheets				Documents			
Year	81	82	83	84	81	82	83	84
Country:								
Argentine				36		18	22	10
Bolivia								5
Brasil	*(1)	12		50	*(1)	25	20	11
Colombia		13		145	*	49	26	22
Costa Rica		14	267	509	*	22	22	27
Chile						65	22	
Ecuador				28	*	21	19	35
El Salvador							13	2
Guatemala	*	35	279	114	*		22	14
Honduras		45	129		*	27	27	8
Mexico						27	30	11
Panama	*	15	184	85	*	22	13	18
Paraguay				103		10	15	6
Peru						17	18	13
Uruguay		13			*	4	9	8
Venezuela	*	22			*		14	10
Total	1,172	169	859(2)	1,070	?	307	292(2)	200
	3,270				799			
Total entries	4,069(3)							

Remarks: (1) Exact figures are not available - only total is known.

(2) During this period about 60% of entries did not enter the data base due to computational problems and change of worksheets.

(3) About 120 items are not accessible during on-line searches due to computational problems.

FLOWCHART OF CLAPLAN DATA BASE



HAC = Document Analysis Worksheets
HDB = Bibliography description
TRB = Bibliographic description in index-card format

Table B (11)

Data Base: CLAPLAN
Output: PLANINDEX

N a m e	Volume, number, date	Date of publication	Total entries (xxx)	Caribean	Distribution
PLANINDEX	Vol. 1, N. 1, 1980	February 1980	336	(132)	500
PLANINDEX	Vol. 1, N. 2, Dec. 1980	June 1981	353	(95)	550
PLANINDEX	Vol. 2, N. 1, July 1981	October 1981	340	(101)	1,000
PLANINDEX	Vol. 2, N. 2, Dec. 1981	August 1982	356	(103)	950
PLANINDEX	Vol. 3, N. 1, July 1982	March 1983	247	(40)	1,100
PLANINDEX	Vol. 3, N. 2, Dec. 1982	October 1983	300	(93)	1.220
PLANINDEX	Vol. 4, N. 1-2 1983	Sept. 1984	568	(-)*	1,200
PLANINDEX	Vol. 5, N. 1-2 1984	December 1984	576	(-)*	1,200
PLANINDEX Panama	Vol. 1, N. 1, July 1984	January 1985	100	(-)	100
PLANINDEX Guatemala	Vol. 1, N. 1, Sept. 1984	October 1984	213	(-)	100

* No Caribean entries because a new input sheet was developed.

Table 5 (12)

Total input into. CLAPLAN

Date	No. of entries	Entries published in PLANINDEX
Up to 4/82 (Batch)	1,461	1,385
5/82 - 12/82	693	
1/83 - 12/83	713	
1/84 - 12/84	926	1,691
1/85 - 2/85	262	
Total	4,200	3,076

Table B (13)

Some Qualitative Aspects of PLANINDEX Entries

Authors of documents:

Author	Percent
Regional organisations	5
International organisations	7
National institutions and Personal authors	88

Geographical area to which documents relate:

Area	Percent
Central America	42
South America	37
North America	0.5
caribbean	17
Asia	2
Europe	1.5

Source documents:

Form	Percent
Published documents (printed)	56
Reports (grey literature)	38
Working papers	2
Other source documents	4

DATA BASE: CLAPLAN

TOTAL ENTRIES LISTED BY DEVSIS CATEGORIES (One category for each entry) (on-line data-base only).

DEVSIS CATEGORY		ENTRIES
Facts, trends and analyses		
A10	Basic information and data: national and international	172
A15	Basic information and data: subnational	42
A20	Extrapolations and forecasts: nationals and internationals	35
A25	Extrapolations and forecasts:sub-national	12
A30	Existing situations: international and national	448
A35	Existing situations: sub-national	58
Prescriptions for decision-making		
B10	Prescriptions for development policy or action: internations and natinal	425
B15	Prescriptions for development policy or action: subnationals	85
Official policies, plans and programmes		
C10	Official statements of development policy	76
C15	Commentaries on official policies and activities	19
C20	Development plans	471
C25	Commentaries of development plans	20
C30	Legal, financial and administrative arrangements: international	17
C35	Legal, financial and administratives - commenteries	11
C40	Legal, financial and administrative arrangements:national and sub-national	53
C45	Commentaries on national arrangements: legal, financial and administrative	11
Development action: operational experience		
D10	Studies for particular projects	116
D20	Development resources (particular projects	13
D30	Announcements and descriptions of new projects	104
D40	Operational experience (particular projects)	38
D50	Operational experience (general)	50

	DEVSIS CATEGORY	ENTRIES
Consequences and evaluation		
E10	Impact: international and national	35
E20	Impact: sub-national	14
E30	Evaluations	44
Resources and tools for development		
F10	Research	53
F20	Information	58
F30	Men, money and materials: international and national	21
F40	Men, money and materials: sub-national	16
F50	Models, methodologies, techniques and tools	105

Table B (15)

Work Steps for Documents Inputted into CLAPLAN's Data Base

Remark: The analysis of the system as described here is incomplete. An in-depth analysis (as required for systems streamlining) will probably reveal additional work steps.

1. - Reception of document in CLADES
2. - Registration of document in a card with simple cataloguing sufficient to identify it, plus addition of country code as well as consecutive number in the country.
3. - Preparation of label with country code and corresponding number
4. - Sticking of label on document
5. - Placing of document on the shelves according to the country and number of document
6. - filling in a form which serves as receipt of document (if sent from a country)
7. - Mailing the forms
8. - Selection of document for information processing
9. - Application of "blue form" to document with the indication of type of analysis needed
10. - Document is given to abstractor
11. - Preparation of abstract/indexing/application of DEVSIS category on worksheet for the contents analysis (HAC)
12. - Revision of worksheet (HAC) by the supervisor
13. - Document and worksheet are given to the key puncher every Friday as part of the 150 documents that should be fed into the computer every month
14. - Preparation of packets with the 150 documents and corresponding worksheets (HAC) that are sent to the Cataloguing Unit in the library for cataloguing in a

worksheet (bibliographic description sheet - HDB). The preparation of these packets imply the following activities:

a.- numbering of document according to corresponding ISIS number (on worksheets)
b.- numbering of document with an access number (on work sheet)
c.- preparation and numbering of each package of more or less 17 documents
d.- preparation of sheet that describes the content of each packet
e.- inclusion of that sheet in the corresponding packet
f.- delivery of the total number of packets to the library

15. - Receipt of the packets by the Cataloguing Unit
16. - Preparation in the Cataloguing Unit of the worksheets containing the bibliographic description of documents or parts of documents (HDB worksheet)
17. - Receipt by CLADES of the packets with the documents and corresponding sheets (HDB and HAC)
18. - Separation of documents and worksheets and collection of blue internal forms
19. - Filling of sheet with information on number of items in the packet for internal use (to check access numbers, to check on possible duplications of entries, etc.)
20. - Placing of documents on shelves according to numbers (access numbers)
21. - Return to the ECLAC's Divisions of those documents that belong to them and that are fed into the data base.
22. - Collection of the worksheets (HDB and HDC) to feed the data base
23. - Key punching of this information into the computer
24. - Transfer of this information into the data base at the end of each month
25. - Preparation of the first computer output for corrections

26. - Correction of this output
27. - Feeding of corrections into the computer
28. - Transfer into the data base
29. - Preparation of first draft for PLANINDEX

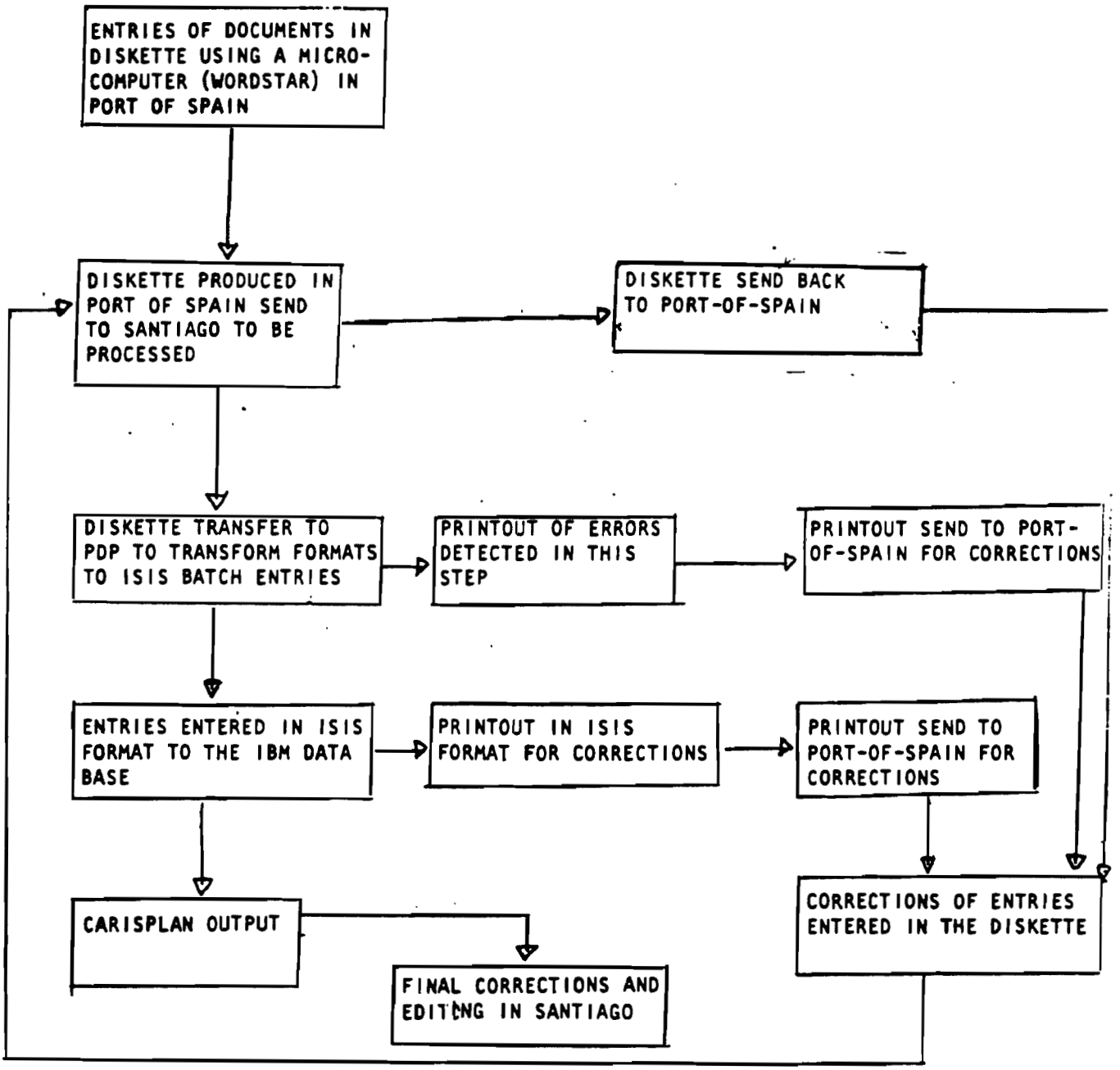
In the case of the worksheets received from the countries, the flow is the following:-

1. - Reception of worksheets in CLADES
2. - Recording in a special book of the number of worksheets received and the country and focal point that sent them
3. - Acknowledgement of reception to focal point through a letter
4. - Storage of worksheets for further processing

Then the steps followed are the same from number 8 onwards with the exception of an extra step before 10:

- Assignment of DEVSIS categories

FLOWCHART OF CARISPLAN DATA BASE



CARISPLAN DATA BASE (Note.- This data base is not available for on-line searching in Santiago because there is no space in disk to invert the file)

Table B (17)

CARISPLAN - CARISPLAN ABSTRACTS

No.	Year	Number of Entries	Date of Public.	Distribution
1	1980	250	1980	
2	1980	301	1980	
3	1980	269	1980	
4	1981	218	Oct. 1981	
5	1982	198	1982	
6	1982	198	1982	
7	1983	377	June 1983	600
8	1983	473	Oct. 1983	600
9	1984	450	June 1984	600
10	1984	545	in preparation	

Table B (18)

CARISPLAN - Type of Data Entry

	Total Number of Entries	Number of Entries Published in CARISPLAN
Batch	3297	2734 (from 1 to 9)
CLAPLAN	1272	545 (N. 10)
In Process	1532	—
Total*	6101	3279

*All records are searchable (by limited terms) at Caribbean Information Center

Table B (19)

CARISPLAN input by National Centers and Regional Organizations

	Phases 1 + 2 (1979 - December 1982)	Phase 3 (January 1983 - December 1984)	Total
Barbados	158	-	158
Belize	3	23	26
Cuba	637	264	901
Dominica	-	43	43
Grenada	13	11	24
Guyana and CARICOM	241	149	390
Haiti	12	84	96
Jamaica	439	658	1,097
Montserrat	90	23	113
Republica Dominicana	77	-	77
Suriname	16	18	34
St. Kitts/Nevis	18	-	18
Saint Lucia	7	-	7
Saint Vincent and the Grenadines	12	38	50
Trinidad and Tobago	467	94	561
CDB (Carib. Dev. Bank)	141	entire data base	141+
CTRC	17	-	17
UWI (Univ. West Indies)	93	-	93
	2,441	1,405	3,846

Table B (20)

User Statistics

	Phase 1 1979-12/1980	Phase 2 1/1981-12/1982	Phase 3 1/1983-12/1984	Total
Loans	-	1,327	2,125	3,452
Queries	240	378	831	1,449
Documents supplied	146	208	1,898	2,252
Photocopies (No. of pages)	-	12,345	42,232	54,577

Table B (21)

CARIBPLAN - Main Subject Areas

(Figures relate to a sample of about 60% of documents in data base)

Subject	Percentage %
Economic development	17.1
Regional and technical cooperation	15.2
Trade and Industry	26.7
Planning	12.8
Agriculture	12.4
Education	7.2
Transport and Energy	12.2
Demography	4.4
Natural resources	3.9
Environment	3.3
Science and Technology	3.2
Tourism	3.5
Other subjects	5.8

Table B (22)

INFORMATIVO INFOPLAN

Issue Date	Publication Date	No. of items reported by country	No. Copies distributed in L. America
No. 1 March-April 1984	June 84	AR(5) BR(5) CL(1) CO(5) EC(2) GT(4) HN(7) MX(2) PA(3) PY(3) PE(2) UY(2) VE(5) XL(4)	893
No.2 July 1984	September 84	CO(5) CR(17) SV(4) GT(10) HN(8) PA(10) XC(8)	900
No.3 November 1984	January 85	AR(9) BR(7) CO(15) CR(4) EC(7) GT(1) MX(1) PA(3) PY(7) VE(5) XL(12)	900

ANNEX C

Abbreviations and Acronyms

Abbreviations Used for Countries in Latin America (ISO Code)

AMERICA LATINA	XL
Antigua	AG
Antillas Neerlandesas	AN
Argentina	AR
Bahamas	BS
Barbados	BB
Belice	BZ
Bolivia	BO
Brazil	BR
Colombia	CO
Costa Rica	CR
Cuba	CU
Chile	CL
Dominica	DM
Ecuador	EC
El Salvador	SV
Granada	GD
Guadalupe	GP
Guatemala	GT
Guayana Francesa	GF
Guyana	GY
Haiti	HT
Honduras	HN
Islas Caiman	KY
Islas Malvinas (Falkland)	FK
Islas Turcas y Caicos	TC
Islas Virgenes Britanicas	VG
Jamaica	JM
Martinica	MQ
Mexico	MX
Montserrat	MS
Nicaragua	NI
Panama	PA
Paraguay	PY
Peru	PE
Puerto Rico	PR
Republica Dominicana	DO
San Cristobal-Nieves-Anguila	KN
Santa Lucia	LC
San vicente	VC
Suriname	SR
Trinidad y Tabago	TT
Uruguay	UY
Venezuela	VE

ANNEX C (2)

ACRONYMS OF SUBJECT OR MISSION ORIENTED INFORMATION SYSTEMS IN LATIN AMERICA

AGRINTER	SISTEMA INTERAMERICANO DE INFORMACION PARA LAS CIENCIA AGRICOLAS - San Jose: CR.
ALIDE	ASOCIACION LATINOAMERICANA DE INSTITUCIONES FINANCIERAS DE DESARROLLO - Lima
ASIP	ASOCIACION INTERAMERICANA DE PRESUPUESTO PUBLICO - Mexi
BIREME	RED DE INFORMACION EN SALUD PARA AMERICA LATINA Y EL CARIBE - San Paulo
CLAD	CENTRO LATINOAMERICANO DE ADMINISTRACION PUBLICA - Caracas
CIDE	CENTRO DE INVESTIGACIONES Y DESARROLLO DE LA EDUCATION - Chile, Santiago
CINTERFOR	CENTRO INTERAMERICANO DE INVESTIGACION Y DOCUMENTACION EN FORMACION PROFESIONAL - Montevideo
CRESALC	CENTRO REGIONAL DE ENSENANZA SUPERIOR DE AMERICA LATINA - Caracas
CSUCA	CONSEJO SUPERIOR DE UNIVERSIDADES CENTROAMERICANAS - San Jose: CR.
DOCPAL	DOCUMENTATION CENTER ON POPULATION AND DEMOGRAPHY IN LATIN AMERICA - Santiago
ICAP	INSTITUTO CENTROAMERICANO DE ADMINISTRACION PUBLICA - San Jose: CR.
ILANUD	INSTITUTO LATINAMERICANO DE PREVENCION DE LA DELINCUENCIA JUVENIL - San Jose: CR.
INFOTERRA	SISTEMA INTERNACIOANL DE CONSULTA EN MATERIA DE FUENTES DE INFORMACION SOBRE EL MEDIO AMBIENTE -
JUNAC	JUNTA DEL ACUERDO DE CARTAGENA - Lima
LATINAH	RED LATINOAMERICANA DE INFORMACION SOBRE ASENTAMIENTOS HUMANOS - Caracas
PROY. PRIN. EDUC.	PROYECTO PRINCIPAL DE EDUCACION/UNESCO - Santiago, Chil
OLADE	ORGANIZACION LATINOAMERICANA DE ENERGIA - Ecuador, Quit
RELIC	TRADE AND EXPORT PROMOTION INFORMATION CENTER - Lima
REPIDISCA	RED PANAMERICANA DE INFORMACION Y DOCUMENTACION EN INGENIERIA SANITARA Y CIENCIAS DEL AMBIENTE - Lima
SIECA	SECRETARIA PERMANENTE DEL TRATADO GENERAL DE INTEGRACION CENTROAMERICANA - Guatemala
SIDREE	SISTEMA DE INFORMACION SOBRE EDUCATION EXTRAESCOLAR - Guatemala

ANNEX C (3)

Abbreviations and Acronyms

A special List is provided for:

(1) Abbreviation code of country names
(2) Acronyms of information systems

BIBLIOS - data base of documents in CEPAL library
CARICOM - Caribbean Community Secretariat
CARISPLAN - Caribbean Information System on socio-economic Planning,
CDC - Caribbean Documentation Center
CDCC - Caribbean Development and Cooperation Committee
CEDOP - Center of Documentation, Min. of Planning Costa-Rica
CELADE - Latin American Center for Population and Demographic Research
CENTRIPLAN - Proposed Central American System for INFOPLAN
CEPAL - Economic Commission for Latin America and the Caribbean
CLADES - Latin America Center for Socio-economic Information and Documentation
CLAPLAN - Computerized data base of INFOPLAN
DEVSIS - Development Information Services System
DOCPAL - Documentation Center of CELADE
ECLAC - Economic Commission for Latin America and the Caribbean
IDRC - International Development Research Center - Canada
ILPES - Latin American Institute for Social and Economic Planning
INFOPLAN - Latin American Information Network on Planning
INFORMATIVO - Newsletter on INFOPLAN activities
ISIS - Integrated set of information systems - a software package
NAPLAN - National Information System for Planning
PLANINDEX - Abstract journal of INFOPLAN
RED NAPLAN - National Network for INFOPLAN
U.W.I. - University of the West Indies
WIPO - World Intellectual Property Organisation

ANNEX D

Persons and Documents Consulted

ANNEX D (1)

Persons consulted and interviewed:

Colombia

F. Damtoft, IDRC regional rep.;
S. Castillo, Coordinator Nat. Network;
L. Fenney Perez, Fund. Educ. Superior;

Chile

R. Brown, Director ECLAC/CEPAL;
C. Evangalista, Director CEPAL/CLADES;
L. Johnson, CLADES;
M. Beya, CLADES;
J. Cubillo, CLADES;
X. Feliu, CLADES;
M. Ferrer, CLADES;
L. Alba, CLADES;
M. Hewitt, Chief, Computer Center CEPAL;
R.F. Bajraj, Director, ILPES;
J. Israel Russo, Tech. Secr. ILPES
A.M. Prat, CONICYT;
B. Vodanovic, CELADE;
S. Alvarez, Operations Dir. CEPAL;

Paraguay

O. Martinez, Coordinator, Nat. Network;
F. Monjes, General Planner, Secr. of Planning;
A. Lopez, Population expert, Secr. of Planning;

Trinidad and Tobago

C. Applewhite, Director, ECLAC-Caribbean
W. Primus, Director, Carib. Doc. Center, ECLAC;
J. Casimir, Social Affairs Officer, ECLAC;
J. Modeste, CDC - ECLAC;
D. Alexander, CDC - ECLAC;
P. Raymond, Librarian, Min. of Finance;
J. Stuart, Librarian, Central Bank, TT;
P. Benson, Librarian, Min. of Energy;
J. Jordan-Dopwell, Librarian, Min. of Finance;
B. Comissiong, Dep. Librarian, UWI;
S. Evelyn, Librarian, UWI;

Panama

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D. Brathwaite, Computer Center, Min. of Planning;

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C. Raab, Director, Dep. of Information MIDEPLAN;
A. Gonzalez Valle, former Coordinator, Nat. Network;
M. Rios, dept. Director, Dept. of Information MIDEPLAN;
A.L. Echavarria, Librarian, Social Sciences, U.C.R.;
R. Mendez Boza, Inst. Technologica, I.T.C.R.;
D. Vargas de Bonilla, Librarian, Central Bank;
M. Vallejos Vasquez, interim Coordinator, Nat. Network;

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